Response To

Request For Proposal

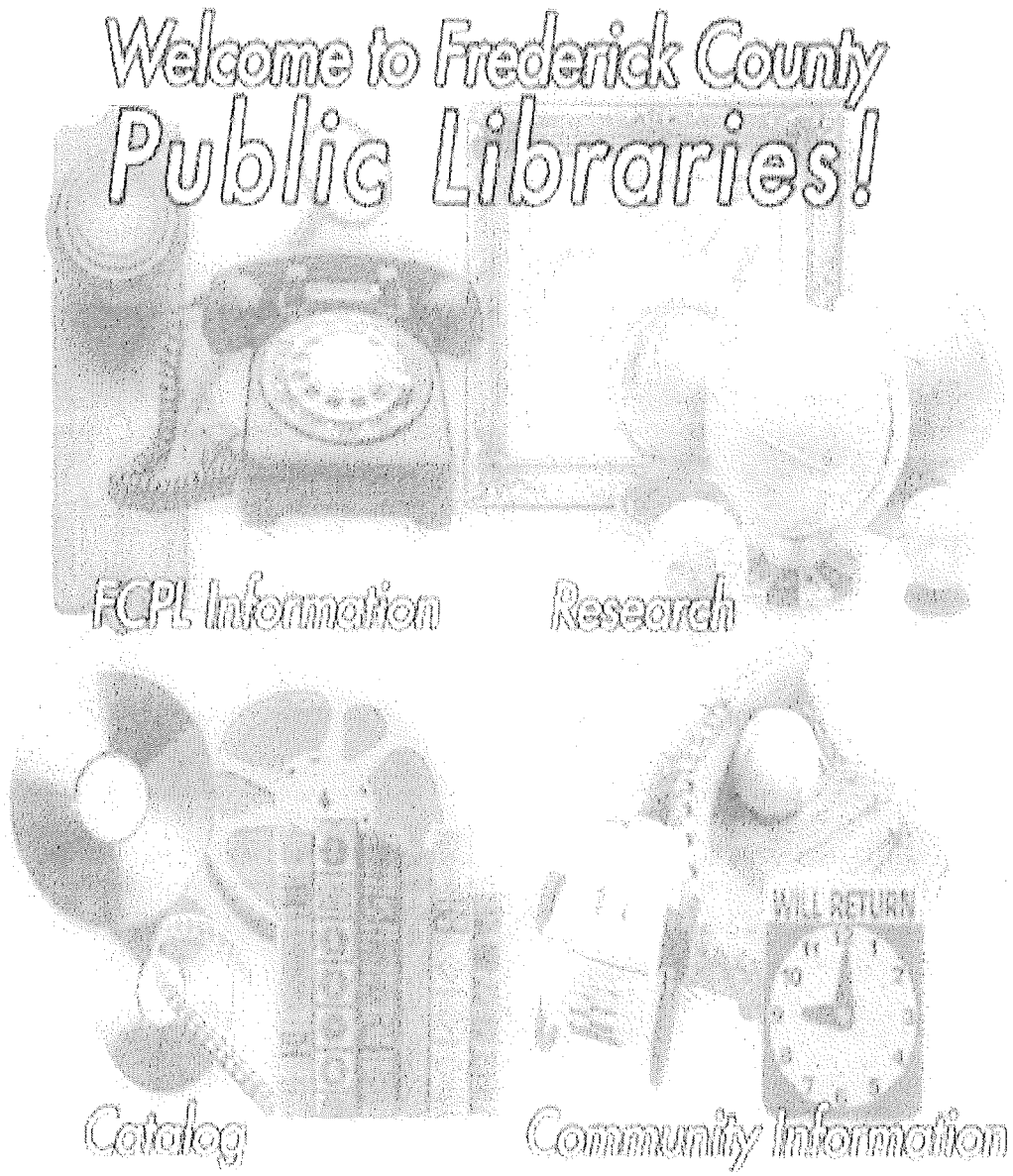
RFP #01-77, (#0000000275) Library Automation Software

For

Frederick County Public Libraries

For An

Integrated Client/Server Library System



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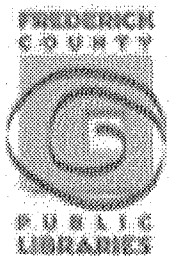

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Response To

Request For Proposal

RFP #01-77, (#0000000275) Library Automation Software

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For An

Integrated Client/Server Library System

Part 1

"Cover Letter"

July 12, 2001

Data Research Associates, Inc.

1276 North Warson Road
Post Office Box 8495
St. Louis, MO 63132-1806 USA
800 325-0888 US/Canada
314 993-8927 Facsimile
314 432-1100

July 11, 2001

Ms. Patricia M. Guise, CPPB
Senior Buyer, Purchasing Department
Winchester Hall
12 East Church Street
Frederick, Maryland 21701

Dear Ms. Guise:

Data Research Associates, Inc. is pleased to respond to the Frederick County Public Libraries' Request for Proposal for an automated, integrated client/server library system.

This response presents Taos, DRA's next-generation library automation system. As you may know, Taos has been in general release for nearly two years and is installed at locations throughout the United States, as well as in Europe and South America. Combining performance, flexibility and scalability, Taos has the unrivaled ability to connect Frederick County Public Libraries' patrons with the information they seek.

Taos' exceptional system capabilities, combined with DRA's knowledge of and experience in working with many other library systems in your area, will be a great advantage for Frederick County Public Libraries. We hope you will contact the excellent references provided with this proposal, particularly Anne Arundel County, Caroline County, Southern Maryland, and Chesapeake Public Library Systems.

DRA's superior product development, financial security, and commitment to customer satisfaction are appreciated by our library users throughout Maryland and indeed, worldwide. We are confident that the information provided in this response will show Taos to be an outstanding solution for the Frederick County Public Libraries, and sincerely hope that you will want to further investigate the many benefits Taos and DRA can provide your library system.

We would be delighted to clarify any answers provided in this response, so please do not hesitate to call me at (804) 784-3800. It would be my sincere pleasure to return to Frederick County to see you all again, and to show you the Taos System. We look forward to hearing from you.

Kind regards,

Kate Duval

Kate Duval
Regional Manager

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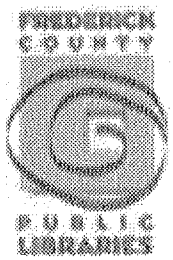

Response To

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RFP #01-77, (#0000000275) Library Automation Software

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Part 2

"Vendor's Response"

July 12, 2001

2.1. Vendor Profile

Vendor Profile **A brief description of the vendor's background, organization, staff, experience, and product line must be included in this section. Vendor should demonstrate financial stability and describe any outstanding litigation. The names and experience of the vendor's staff assigned to the FCPL project.**

Data Research Associates, Inc. (DRA) Corporate Profile

DRA is a financially sound, mature company which has been providing state-of-the-art library automation services since 1975. We serve a large, diversified customer base consisting of public, state, special and academic libraries, as well as large academic library consortia. Careful planning, sound management, steady growth and profitability have established DRA as one of the largest companies in the library automation industry, with our systems now serving more than 2,300 libraries worldwide.

We attribute much of our long-term success to our commitment to standards; a clear growth and scalable development path for both our products and the libraries that use them; and a senior management structure that has remained consistent since the inception of the company. DRA founder Michael J. Mellinger continues as president and CEO, and the average length of service for the Company's vice presidents is ten years.

As a truly "open" company, for many years we have annually submitted to an outside audit by a major national accounting firm and have released our financial statements to the public. In 1992, DRA became a publicly held company, traded on the Nasdaq under the symbol DRAI. As of our most recently reported quarter, we maintained a strong financial position with $20.7 million in cash and short-term investments available for investment into our long-term viability.

On May 17, 2001, DRA and SIRSI jointly announced the signing of a definitive merger agreement. When combined, the new DRA-SIRSI company is expected to be a leader among vendors in the library automation industry, based on number of installed systems, according to data compiled and published in the March 2001 issue of *Library Systems Newsletter.*

"As a multi-platform vendor, the combined SIRSI-DRA will offer a variety of leading-edge products serving the widest range of library customers," said Michael J. Mellinger, DRA's Chairman of the Board, President, and Chief Executive Officer. "DRA and SIRSI will be a formidable force in the library industry."

Mr. Mellinger will remain an integral part of the management of the combined organization, serving as Chairman of the new DRA, as well as on the Board of Directors of SIRSI. Upon completion of the planned merger, DRA's product development, services, support and other operations will continue to function in full support of the DRA customer base.

DRA's Year 2000 Annual Report accompanies this proposal in Appendix A. As stated in that report, DRA has no outstanding litigation.

Organization and Staffing

DRA currently has over 200 employees supporting the Data Research Taos and Classic systems, the DRA INLEX/3000 system, and the DRA MultiLIS system. Key employees and their assignments are listed below. Other employees will be assigned as necessary to meet your automation needs.

Michael J. Mellinger, President and Chief Executive Officer
Katharine W. Kilper, Vice President and Chief Financial Officer
Mike Casale, Vice President Customer Service
Berit Nelson, Vice President Software Development
Andrew Morrice, Vice President International Operations/Sales/Marketing
Kate Duval, Regional Manager

Resumes

MICHAEL J. MELLINGER, President, Chief Executive Officer and Chief Operating Officer Since founding Data Research Associates, Inc. in 1975, Mike Mellinger has served as the principal architect of the DRA library automation solution, and the main liaison between the company and our library partner customers. Under his guidance, DRA anticipated the benefits of global resource sharing, client-server architecture, and the Internet to bring libraries into the new era of electronic information management.

With extensive knowledge of computers backing his move into library automation, Mike began DRA envisioning the development of a computer system that could easily share information as well as support the "then" fairly new standard, the MARC record. This early support of the MARC record led to Mike championing the importance of standards to libraries worldwide. In 1992, Mike was elected to the Board of the National Information Standards Organization (NISO), the official ANSI body for the consensus standards for libraries, publishers, and other information providers. During his eight years with NISO, he served as both Chairman and Treasurer, and today remains a strong advocate of this organization.

Mike's fascination with computers began at an early age. He taught himself programming while in high school on a research fellowship at the California Institute of Technology. Mike later attended, on a full scholarship, one of the nation's pioneering computer science programs at Washington University in St. Louis, MO. He applied his knowledge of the high-tech industry to include computer hardware and software design, and has programmed on most of the major computer systems and in more than a dozen coding languages.

KATHARINE W. KILPER, Vice President and Chief Financial Officer Ms. Kilper has responsibility for all financial and administrative functions for DRA including accounting, financial reporting, banking and personnel. Ms. Kilper joined DRA in 1986 with a background in public accounting that encompassed all aspects of accounting and taxation for privately held corporations. She was promoted to Controller in 1989 and to Vice President in 1991. Ms. Kilper holds a Bachelor of Arts degree and is a licensed Certified Public Accountant. She is a member of the American Institute of Certified Public Accountants and is active at both the state and local levels in the Missouri Society of Certified Public Accounts.

MICHAEL A. CASALE, Vice President, Customer Service Mr. Casale has been DRA's Customer Service Manager since April of 1999. Mike has extensive experience in library automation, joining Inlex, Inc. in 1989 as a customer support technician and eventually becoming its third-party relationships manager. After completing his M.B.A studies in 1994, he rejoined Inlex, which had been acquired by DRA. He was promoted to branch manager of DRA's Monterey, California office in 1995, and in that role demonstrated excellent skills in all phases of managing an independent, remote operation within DRA. Mike's broad understanding and excellent implementation of customer service has been recognized by users of the INLEX/3000 system, who last year rated their customer service the highest of all DRA's legacy products.

BERIT C. NELSON, Vice President, Software Development Ms. Nelson, a ten-year employee of DRA, is responsible for the company's Taos development as a product librarian, team leader and manager. Berit joined DRA as a software specialist/trainer and her extensive experience in a number of departments, including sales support and sales account management, has given her important sensitivity to customer needs. Prior to joining DRA, Ms. Nelson worked in the Acquisitions department at the University of Missouri-Columbia. She received her bachelor's degree at Carleton College and completed her M.L.S at the University of Missouri-Columbia.

ANDREW MORRICE, Vice President, International Operations/Sales/Marketing
Mr. Morrice oversees DRA's international operations, including offices in Montreal, Paris, and Singapore, as well as DRA partners in Australia and New Zealand. In addition to those duties, he has recently assumed leadership of the Sales and Marketing departments. Joining DRA in 1994 as regional manager of DRA's Australian subsidiary, Andrew subsequently assumed responsibility for the company's Singapore operations. Prior to his tenure at DRA, Andrew backed his expertise in software development, support, installation, training, and sales with seven years of computer experience, predominantly in library automation. Andrew's experience managing complex systems integration projects in multi-country environments gives him a real understanding of the business and technological issues intrinsic to international transactions. Andrew holds a Bachelor of Applied Science in Computing, a Bachelor of Business in Marketing and a Masters degree in International Business from Melbourne University.

KATE DUVAL, Regional Manager As DRA's Regional Manager for the Northeastern United States, Kate Duval has over twenty years of experience in library automation.. Prior to working at DRA, Kate served as Senior Marketing Consultant for The Computer Company in Richmond, Virginia. In this position she provided bibliographic and authority control processing services to all types of libraries, working with nearly all of the industry's systems vendors. Since joining the DRA team thirteen years ago, Kate has skillfully assisted library customers throughout the Northeast and Canada, most recently in their migrations to Taos, earning their respect and gratitude for her exceptional service.

Resumes of our Project Managers are provided below:

SHARON HURLDS, Project Implementation Team Leader Ms. Hurlds joined DRA's St. Louis office in February 2001 and is responsible for managing the implementation and conversion activities for our products. Sharon comes to us from the Healthcare Information Technology industry, in which she has had extensive experience as Project Manager/Director for large scale, complex projects. She has managed a Customer Support Center, as well as the Clinical Information Department in a local hospital. Her understanding of the Information Technology business and Project Management is an asset to the DRA team. Sharon holds a Bachelor of Science in Education degree.

JANE ERVIN, Project Manager Ms. Ervin joined DRA in 2000. She previously served as a Librarian and Research Specialist for 23 years in academic, public and special library environments, in addition to working in corporate strategic planning. Ms. Ervin holds a B.S. from Southeast Missouri State University and an M.A. in Library Science from the University of Missouri at Columbia. She is currently a member of SLA.

STACI McTAGUE, Project Manager Ms. McTague joined DRA in 2000, after working in the software industry for six years. Ms. McTague has worked in all phases of the software industry including training, documentation, technical support, development, installation, and project management. She has worked on software implementation projects of varying scope and complexity. She holds a Bachelor of Science degree from the DeVRY Institute of Technology in Kansas City, Missouri.

The Conversion Group will be responsible for migrating your database.

KATHY ARMSTRONG, Conversion Specialist Ms. Armstrong has been with DRA since 1999, but has been working in the library field for the past 25 years. Her experience includes public libraries and school libraries, as well as several years in academic libraries. Prior to DRA, she worked at Washington University in the law library both in the cataloging and acquisitions departments. During this time, she was involved in retrospective conversion of the collection, and migration to an on-line system. She holds a B.A. in English/Education and an M.A. in Geography as well as an M.L.S. from the University of Missouri at Columbia. In addition to her responsibilities at DRA, Ms. Armstrong also is a part-time instructor at the University of Missouri at St. Louis.

BILL ELLETT, Conversion Specialist Mr. Ellett has been with DRA since 1988, but has been working in and with libraries for over 30 years. At DRA he has worked with all phases of the system, primarily in product development and support. He is currently part of our Conversion Team. Previously, he served as Automation Coordinator at the South Carolina State Library, where he oversaw the implementation of the statewide LION (Library Information Online) system, and as Head of Cataloging at a consortium of 34 college and special libraries. He has worked extensively with automation of libraries for the blind and physically handicapped. Mr. Ellett has served on several national committees, including OCLC's Cataloging Advisory Committee, OCLC's Internetwork Quality Control Council, and PLA committees which drafted the new Community Information MARC Format. He received his Masters degree in Librarianship in 1977 from Emory University, and his B.A. from Davidson College in 1975.

MAUREEN HERRAGHTY, Conversion Specialist Ms. Herraghty's 14 years in libraries includes technical services positions in university, public and special libraries. She has been part of library implementation teams for two library automation systems and has extensive experience not only in cataloging but also in retrospective conversion and authority work. She is qualified to perform original cataloging in French, Latin and Italian in addition to English. She holds a B.A. in history and an M.L.S., both from Louisiana State University.

Our Training staff and their resumes are included in Section 2.15 of this proposal.

2.2 System Growth and Conversion of Data

System Growth & Conversion of Data **Vendor should describe how the proposed software would handle future growth of the FCPL, including additional workstations, volumes, patrons and system features. The vendor must also include information on what they expect FCPL to do to prepare our database for a satisfactory transition. The physical medium and data formats in which FCPL will be accepted must also be included.**

DRA is pleased to propose Taos as a flexible, robust system capable of providing Frederick County Public Libraries with a fully integrated library management solution designed to serve the needs of your patrons and staff today, and for many years to come.

System Growth and Scalability

The advantages of Taos to Frederick County Public Libraries include sophisticated design techniques that have made Taos a system that will be easier to maintain and quicker to upgrade, whether adding workstations, increasing holdings, or serving more patrons. By its very nature, Taos' design results in flexibility that will provide FCPL virtually unlimited ability to modify your library automation system's look and feel and to match your growth requirements.

Taos' open architecture and n-tiered object-oriented client/server design is the foundation of our system's built-in expandability. Meeting and exceeding industry standards, Taos' server offers system scalability – the ability to meet the needs of your library as it grows, in a cost-effective manner that will protect your investment.

The ODBMS is especially well-suited to handle the increasing amount of non-bibliographic documents and multimedia that are part of libraries' collections, since it can store such materials in native form right in the database. In addition, an object-oriented database allows much more flexibility in dealing with complex library materials such as multi-volume sets, periodicals with irregular publication dates, and flat files of photographs.

The Taos Server configuration proposed by DRA will support systems for up to 500 simultaneous users, and can be upgraded in increments of ten (10). Disk can be added incrementally up to a 2TB (terabyte) disk (equivalent to 2,000 gigabytes). Memory can be added incrementally up to 8GB (gigabytes).

Data Preparation

DRA recommends FCPL perform its own preprocessing maintenance in accordance with standard VTLS practices, prior to beginning the data conversion process. In addition to standard accuracy matching, routines to generally "clean up" older records by checking for and updating obsolete data are highly desirable.

Physical Medium

DRA recommends that FCPL data be transferred using FTP (File Transfer Protocol) rather than a physical medium for delivery. However, if FCPL desires to use a physical medium such as tapes, the medium simply must be compatible with the hardware to be used in transferring the data.

Data Format

DRA offers a set of standard programs to load bibliographic records in MARC format. These programs include the ability to remove duplicates and check the filing indicators in specified MARC fields. FCPL may change these according to parameters that would be agreed on mutually. The database will be indexed according to a table of MARC fields/subfields that will be tailored to meet FCPL's specific needs.

If the data is not provided in MARC format, DRA will be able to map to MARC for loading into your database. We have successfully converted non-MARC bibliographic records on many occasions. The database will be indexed according to a table of MARC fields/subfields that will be tailored to meet your specific needs.

DRA will work closely with FCPL to map the data from your other existing files into the DRA format. This could include holdings, patron and circulation transaction data, and other types of data such as serials records, depending on what can be extracted from your present automated system. We will write a conversion specification document describing exactly how this mapping will take place for each of the existing files you wish to convert. We will ask you to review and approve each of these specification documents. The approved documents will then form the basis for the design and testing of any programs that must be written to convert your data.

2.3 Licensing Issues

Licensing Issues **Vendor must submit any software licensing restrictions, including maximum number of workstations (OPAC and staff), cost of additional licenses, and licensing issues for remote access (Z39.50 clients, remote PAC clients, etc.). How is simultaneous use with WWW connections monitored? What happens if the maximum number of licensed users is exceeded?**

Overall access to the system is governed by the number of simultaneous sessions for which a particular library is licensed. DRA's per-module licensing is based on overall simultaneous connection. If, for example, FCPL anticipates that 10 staff will use technical service modules simultaneously, 6 staff will use circulation stations, and 20 users will use Public Access, FCPL would purchase a 40 user license which would cover both staff and Public Access activity, regardless of which specific modules and functions were being used at any given time.

With respect to DRA system databases, if a site wants to restrict the number of concurrent users to its own databases, our software does not allow for a concurrent user limit for the connections which are being made via either direct connects or DRA database connections. However a User Authorization File (AUF) will allow a site to set a profile for a particular user or class of user with restrictions on the number of simultaneous sessions for which that user can have access to DRA's databases.

A site's OPAC (DRA Web2) license determines the maximum number of simultaneous sessions that may be in use. Sites may reduce the number of available sessions below their licensed limit through the setting, "available_sessions" in DRAWeb.set or use the corresponding DOS command line option "-U". When all the sessions are in use, the next user that tries to log in to Web2 will be asked to try again later. Each library's exact "busy" message can be easily customized in the file sessionlimit.html, which is found in the DRA Web2 root directory (C:\Taos\Web2, by default).

An internal software license limits server activity to the number of contracted, authorized licensed sessions that have been contracted for with DRA. Additional software licenses may be purchased in increments of 10 users.

2.4 Implementation Schedule

Implementation Schedule **Vendor is to provide at least one implementation schedule for system installation outlining what will take place and the responsibilities of the vendor and the Library. Requirements for this implementation schedule are detailed on page two of this document. Vendor is required to provide all information outlined in the Implementation Section on Page 2 of this document.**

DRA has designed an efficient, systematic approach to Taos implementations. We developed this process over the many years we have been in the library automation business and the hundreds of successful automation projects DRA has installed. DRA has extensive experience in successfully converting VTLS systems to Taos, including Chesapeake Public Library System and Virginia Beach Department of Public Libraries, as well as the North Star Borough Public Library in Fairbanks, Alaska.

Taos Project Management Team

DRA will provide a highly skilled Taos Project Management team dedicated to achieving a smooth and efficient transition for Frederick County Public Libraries' migration to the Taos system. Three key DRA staff will lead the Taos Project Management team: the Taos Project Manager, the Taos Conversion Specialist, and the Taos Training Team Leader. Working closely with their DRA team members and the FCPL library staff, the Taos Project Management team will provide the planning, analysis, and management needed for FCPL to successfully implement Taos.

Taos Project Manager

The process begins with DRA assigning a Project Manager to work with Frederick County Public Libraries' project coordinator to execute all of the details for data migration, hardware installation and staff training. The DRA Project Manager will be FCPL's point of contact throughout the installation of the new Taos system and will coordinate the efforts of everyone who will provide service to FCPL. This includes the delivery and installation of the system hardware (if purchased from DRA), the installation of the DRA software, staff training, as well as the disposition of all business functions, such as invoicing and warranty/maintenance issues.

The DRA Project Manager will provide the following consultative services:

- Develop a Project Work Plan
- Prepare for, and conduct, the On-site Project Coordination Meeting
- Present a detailed review of the Taos Policies System
- Address Taos Policies System issues and questions
- Order hardware and monitor the hardware installation process
- Arrange for application and systems operation training
- Provide issue resolution
- Provide project status reports

DRA Conversion Specialist

In addition to the Project Manager, the DRA Conversion Specialist is a key member of the Taos implementation team. DRA's Conversion Specialist will analyze the FCPL current data, and work directly with the FCPL staff to determine how the records from the VTLS system will load and index in the Taos system. The Conversion Specialist will perform the data conversion from the VTLS system to Taos.

Please note: DRA expects that FCPL personnel will extract bibliographic, item, patron and circulation transaction records from the VTLS system in a mutually agreed upon format.

The DRA Conversion Specialist will provide the following consultative services:
- Analyze FCPL test records and write conversion program specifications
- Provide consultation on the conversion specifications and table formats
- Perform the test data conversion
- Perform the live data conversion

Taos Training Staff

DRA has a comprehensive training program designed and taught by librarians and teachers experienced in library automation. DRA will tailor FCPL's training program according to the software and hardware components purchased by the library.

The DRA Training Department is pleased to offer several training options to meet the specific needs of FCPL staff. Frederick County Public Libraries may choose to have on-site training, regional training class participation, or take advantage of DRA's new cost-effective Distance Learning Training.

All Taos training classes offer the traditional high quality DRA is noted for:
- Comprehensive DRA training materials
- Qualified, knowledgeable trainers
- Hands-on learning experience
- One-on-one assistance and guidance
- Opportunities to ask questions
- Guaranteed training*

*The DRA Training Department is especially pleased to provide the DRA Training Guarantee. During each training session, library participants will given the opportunity to complete a DRA training assessment consisting of a 25 question multiple-choice test. Participants achieving an 80% or higher score on the training assessment will have successfully completed the training session. If an individual participant does not successfully complete the assessment, that participant will have the opportunity to retake the same training session via a Distance Learning training session, and there will be no cost for the additional training provided. Please note that the test is not mandatory, but available to FCPL if desired.

FCPL Project Coordinator

DRA highly recommends that FCPL appoint a library project coordinator to represent Frederick County Public Libraries throughout the installation process. This person will communicate to DRA the needs, questions and decisions of FCPL staff. This person will be the primary contact for DRA and for library staff regarding DRA issues. The library project coordinator should be knowledgeable about the current

system data and how the data will be extracted. They should also be responsible for the logistic arrangements for training.

On-site Project Coordination Meeting

The DRA Project Manager will make an on-site visit to present the Taos Project Work Plan to your staff and any interested parties. Topics for this meeting may include:

- An overview of the Taos installation process
- An overview of the system configuration worksheets, including Taos Policies System construction
- Review Taos forms and checklists
- Review network and access issues
- Taos indexing
- Project Work Plan and Schedule

Taos Policies System Construction

The Taos Policies System enables library personnel to customize the operation of Taos to reflect the library's operations. The Policies System lies at the core of Taos, enabling the staff to tailor how Taos works. Configuration of the Policies System is flexible and scalable to meet the needs of any library of any size. Each library determines the information and default values stored in its Policies files.

The DRA Project Manager will provide the staff of the Frederick County Public Libraries with worksheets covering the Taos policy setting to set the overriding system parameters. They will be presented during the On-site Project Coordination Meeting. The worksheets are to help outline, organize, and define the decisions that become input to the Taos Policies System.

During the installation phase of the Taos System, the DRA Project Manager will work closely with the library staff to first understand, and complete, the Policies System Worksheets. After the user configuration files for the Taos Policies System are built and functioning, FCPL can maintain it and change the system as the needs of the library change.

Two Phase Data Conversion Process

Both the Project Manager and the Conversion Specialist will work closely with FCPL to map the data provided to the Taos system. This will include bibliographic, item, patron and circulation transaction data, depending on what can be extracted from the VTLS system. DRA will write a conversion specification document describing exactly how this mapping will take place for each of the extracted files to be converted. DRA will ask FCPL to review and approve each of these specification documents. The approved documents will then form the basis for the design and testing of any programs that must be written to convert the VTLS data.

When the conversion programs are completed, the DRA Conversion Specialist will perform a complete test conversion. FCPL will extract bibliographic, item, patron and transaction data from the VTLS system and make it available to DRA. DRA will run the conversion programs and load the data on the new Taos system. The library will then have several days to test every aspect of the conversion for accuracy. The DRA Project Manager will provide FCPL with checklists to ensure nothing is missed. Doing a full test migration will also help DRA and FCPL know how long the live migration will likely take to complete. FCPL will then also be able to train and test on your own data which has proven to help staff in becoming comfortable with new screen displays and work flows.

For the final conversion, DRA's approach is to convert data in two phases. In the first phase, DRA will convert the bibliographic database, creating item files and patron files. This will be done while the library system continues to use its VTLS system for circulation.

Once the FCPL database, item file and patron file are converted and installed on the Taos system, the staff will no longer use the VTLS system for circulation. FCPL would extract the VTLS transaction files and DRA would convert them to the Taos format. During this short period of time, FCPL would use the DRA Off-line Circulation system to check-out and check-in items. Once the transaction files have been converted, DRA would chronologically process the Off-line Circulation files to bring the transaction data totally up-to-date. FCPL would then begin using DRA Taos for live circulation on the next business day.

Taos Implementation Schedule

The following Taos Implementation Schedule is based on installing the complete Taos system, including all modules of Web2, Cataloging, Circulation, Serials and Acquisitions. The times specified for tasks listed are in accordance with the RFP requirements, but can be easily modified to suit the specific needs of Frederick County Public Libraries staff. The following schedule should be used as a guide. Specific details will be discussed and finalized during the early stages of developing the Project Work Plan.

Date	*Day(s)*	*Responsibility*	*Task*
8/31/01		DRA/FCPL	Contract signed.
9/04/01	1	DRA/ FCPL	Appoint project managers.
9/04/01	1-25	FCPL	Prepares computer site.
9/04/01	1-25	DRA	Hardware ordered and shipped.
9/05/01	2	FCPL	Extracts test records from the existing system and sends to DRA for analysis.
9/05/01	2-25	DRA	Analyzes test records, writes conversion program specifications.
9/13/01	10-11	DRA	Provides profiling visit.
9/14/01	11-18	FCPL	Completes profiling documents, returns to DRA.
9/21/01	18-25	DRA	Reviews profiling documents.
9/28/01	25-32	FCPL	Reviews and approves conversion program specifications
9/28/01	25	DRA	Hardware arrives at the library
10/02/01	29-30	DRA	Hardware installed.
10/04/01	31-91	FCPL	System Reliability tests completed
10/05/01	32	DRA/ FCPL	Final agreement on profiling options and conversion program specifications.

10/08/01	35-81	DRA	Write and test conversion programs.
10/12/01	39	FCPL	Populates DNS tables both forward and reverse.
10/18/01	45-46	DRA	Installs applications software, provides operator training.
10/26/01	54	FCPL	Loads client software in training PCs and tests to ensure everything works (including network connection to the training facility).
11/1/01	60	FCPL	Extracts bibliographic, item, patron and transaction records, making them available to DRA for the test conversion
11/1/01	60	FCPL	Loads client software and Taos.ini on clients and tests to ensure connection can be made to server and software is loaded correctly.
11/11/01	70-72	DRA	Conversion Specialist performs test conversion
11/13/01	72-109	FCPL	Operational Testing
11/26/01	85-88	DRA	Taos Cataloging and Web2 training provided.
12/03/01	92	FCPL	Extracts bibliographic, item and patron records, making them available to DRA for final conversion.
12/04/01	93	DRA	Taos Circulation training provided
12/11/01	100-103	DRA	Taos Acquisitions and Serials training provided
12/11/01	110-114	DRA	Bibliographic database and holdings file are created.
12/16/01	115	FCPL /DRA	Database, holdings and patron files available on FCPL's Taos system for review and approval.
12/21/01	118	FCPL	All circulation activity on the existing system ceases at the end of the business day.
12/21/01	118	FCPL	Extracts transaction files from existing system, making files available to DRA.
12/21/01	118-120	FCPL	Uses Off-line Circulation temporarily.
12/21/01	118-120	DRA	Convert transaction data and process Off-line Circulation files.
12/31/01	120	FCPL	Begins live Taos Circulation on DRA. Authority processing is started, if purchased

2.5 Maintenance and Support Updates

Maintenance and Support Updates **Vendor must describe their customer support policies including any free help lines, hours of operation, how customer support or help desk services are staffed and emergency service. Terms and cost of any available software maintenance agreements must be described in detail. The vendor must also state if a software maintenance agreement is not available for their product.**

Information on the frequency of software upgrades must also be provided. What is the process for loading a software upgrade? Would it be done by FCPL or the vendor? In what form does FCPL receive the software (e.g. ftp or via a Web site). Are instructions for loading the software provided for FCPL staff? How often is the software upgraded?

If the vendor recommends the purchase of additional or new hardware they must state when (days and time of day) hardware maintenance will be provided. The cost of hardware maintenance must be included on the Cost Proposal page.

Customer Support Overview

DRA is well known for its commitment to customer satisfaction. Going the "extra mile" for its customers, DRA has earned an outstanding reputation for high quality service and customer retention, and our Service\Help Desk is a fine example of how very well DRA serves its customers.

Hours of Operation

DRA's Service Desk is available to our customers twenty-four hours a day, every day of the year, and is easily accessible via both toll-free phone lines and the internet.

Customer Support Services Description

The DRA Service Desk handles all customer service calls regarding DRA application software, operating systems, hardware and networking. To ensure a speedy response, all service requests are logged in our tracking system for priority assignment and routed to the appropriate Customer Service Department for resolution.

DRA's Service Desk staff strive to give our customers better performance by closing logs as efficiently and quickly as possible. To do this, our goal is to have the same staff person who answers a call also be the staff to close that call's log. Our Service Desk staff receive ongoing, rigorous training designed to make them knowledgeable and helpful to all our customers.

Problems reported via the internet are handled in much the same manner. E-mail received by our tracking system automatically opens a new incident log, assigning a log number and responding back to the customer via e-mail with that log number. DRA staff members check for new e-mail logs on an hourly basis and begin the process of problem resolution. DRA asks customers with a high priority problem to call us directly with their problem rather than utilizing e-mail so that we can ensure that the problem gets the immediate attention that it deserves.

Priority Service Logs

Service logs are vital to the manner in which DRA supports its many customers. Since our Customer Service department deals with so many logs, DRA continuously prioritizes items as follows:

Priority 1
The customer's system is down and cannot circulate. Because DRA considers getting a customer back online a top priority, we treat Priority 1 calls as emergencies and will take whatever steps necessary to meet first priority needs.

Priority 2
This priority is assigned when a customer's software, such as monthly reports, is not functioning properly. DRA understands the frustration this can cause and makes every effort to resolve such issues the same day.

Priority 3
When customers simply have a question, and their system is functioning properly, DRA staff are available to answer questions as needed. Depending upon the volume of higher priority calls, these calls are generally responded to within one business day.

These priorities are designed to be general parameters, to further help DRA provide our customers the best service and support in the library automation industry.

DRA Customer Support Web Sites

The DRA customer-only web site **Customer.DRA.com** provides our customers with immediate access to proprietary DRA information. As part of an ongoing effort to provide our customers with information and services that make it as easy as possible to manage and operate their DRA library automation systems, **Customer.DRA.com** was designed to help customers learn more about specific DRA library automation issues and ongoing DRA projects.

We also offer a private listserv to quickly communicate important service issues to our customer base. Supplementing several options already in place for customer communications, our listserv provides us with another way to more quickly issue service bulletins, announce product enhancements and provide a range of "did you know?" tips and procedures.

Software Updates

Software enhancements and revisions for the proposed Taos system are generally provided twice a year, with one major and one minor software release annually. Fully tested software updates are provided as part of the library's maintenance support agreement, at no additional charge.

DRA makes Taos software updates available to our customers in two ways: First, DRA compiles and ships Taos software updates on CD-ROM, complete with documentation and instructions for loading the software update. Second, new software releases are available for downloading from Customer.DRA.com. The advantage of downloading updates directly from our customer web site is that the library gains immediate access to the latest Taos software updates and executables, as well as product documentation and downloading instructions. Customers are notified of software updates via DRA listservs and by mail.

Installation of Taos software updates can be easily done by library staff using an Install Shield program. This process takes about ten minutes to upgrade a client workstation. DRA strongly recommends that FCPL consider software such as Microsoft's Systems Management Server (SMS) to handle distribution and maintenance of workstation clients. This software allows functions such as automatic updates of the software on individual workstations upon login to the network. It would also provide FCPL libraries with flexibility in local modification and distribution of client software.

DRA also recommends installing new releases during closed hours to avoid a potential interruption in service. DRA service personnel can install any server upgrades, if your library wishes to have our technicians assist with those upgrades.

Hardware and Software Maintenance

DRA warrants 98% uptime with DRA supplied hardware and purchase of our maintenance uplift program. DRA will warrant that the system hardware and software will meet the reliability and performance requirements as contracted and will continue to do so as long as the system remains under our maintenance agreement. Please see the attached sample agreement for additional information.

Hardware maintenance, including obtaining any necessary parts, is performed by representatives from the manufacturer's local field offices. Due to the high reliability and on-site repair response time, the proposed hardware manufacturer does not have programs in place to provide scheduled preventive maintenance.

If the hardware is purchased from DRA, all quoted server hardware includes a onsite three-year next-business-day service on parts. This service contract can be extended and/or upgraded as needed.

All components are supported by the DRA-recommended manufacturer, which is Dell Computer Systems. Please note that Dell uses all industry standard components which are widely available from many different sources.

Software and Hardware Maintenance Costs

DRA's software maintenance costs are detailed in the sample Contract provided in Part 4 of this proposal. as well as in our Cost Proposal, located in Volume 2, Part 1. As stated in the Software Updates section above, there is no additional cost for Taos software updates.

Hardware maintenance costs are discussed in our Cost Proposal in Volume 2, Part 1 of this proposal.

2.6 File Reorganization

File Reorganization **Does the proposed system require periodic file reorganization? If so, the vendor must explain this process. This explanation must include a list of any files that require periodic reorganization, the length of time the reorganization takes, and information about the availability of the system during this reorganization (e.g. can the system be access by PAC, staff and remote users). The vendor must also include a list of any indexes that will require periodic reorganization and indicate if the system is available to PAC, staff and remote users during the reorganization. If the system is available to users during reorganization will users experience any slowness in response time during this process? The vendor must also state if file reorganization and/or index reorganization is not required.**

The Taos system does not require periodic file reorganization.

2.7 Backup

Backup The vendor must outline the routines they recommend for system and data backup. An estimate of the length of time required for each type of backup is also required. The vendor should use FCPL's database size listed in the System Capacity Requirements section.

The DRA Taos system is designed to provide ease and simplicity in local support and maintenance of the system. We have incorporated several tools to be used with the system that streamline system management. One of these tools is the ObjectStore Database Manager which provides the routines necessary to backup the database. DRA recommends use of incremental backup in order to save all changes on a daily basis. A full backup should be performed at least once a week. The backup routines may be distributed should it be desirable to back up segments of the data to multiple devices in order to speed overall backup processes.

There are essentially two concepts for doing backups with the Taos database. The library may use Windows NT utilities or use Object Store utilities. There are advantages to each. The decision on which to use is driven by the site's operation schedule and available resources. The resources the site should consider are the time available for backups, the disk space available for transaction logs, and the backup media.

An overriding issue is maintaining database consistency of the various files in which data is stored. Bibliographic records, holdings, patrons, fines and indexes are all stored in separate files and are tied together by database control numbers (DBCNs). In order to maintain database consistency during backup, all writes to the database must be stopped or the library must rely on Object Store's ability to maintain a consistent view of all the database files at once.

The advantage to using ObjectStore utilities is that the library may, of course, run twenty-four hour operations. Using Object Store utilities allows continued database access while backups are being performed. Object Store uses the transaction log to maintain a consistent view of the databases at the specific instant in time the backup is started. The data in the backup will be the data that existed at the time backup begins regardless of any transaction made after the backup process starts.

While both backup methods (Windows NT and Object Store Utilities) are viable, DRA recommends that libraries plan a maintenance window each night, to stop the database management system and get a clean backup of data. Taos customers usually choose to backup to tape. However, to minimize downtime, DRA suggests stopping the database management system, copying the database files to a different place on disk, restarting the database management system, and then backing up the copy just made. Using this method, the system is down just long enough to copy the files from disk to disk instead of disk to tape.

DRA estimates the time needed to backup the database to be approximately 15-25 minutes, using a 4MM DAT (digital audio tape) drive

Please note that a complete Taos system backup is not necessary since reinstalling applications is easier than trying to restore them on a Windows platform. A backup of the database and other parts of the system that would be restored would take somewhere in the neighborhood of 17-27 minutes. Libraries may wish to use the Windows backup utility that comes with their operating system, or a third party product such a Veritas Backup Exec, which features autoloader support and more robust and enhanced features.

2.8 Security

Security **Describe both client and server security and any known security issues, including vulnerability to denial-of-service attacks.**

Taos offers numerous levels of security by user, program and function. Security for staff users is set up in your library's Policy Module. The Taos Policies system uses the following text files as input:

- locations.txt
- employees.txt
- policies.txt
- categories.txt

There are no limits to the number of locations, employees, or categories. After the initial setup, no vendor intervention is required to alter the policies. All access rights may be defined based on a specific location.

Each staff user must have an authorized username and password to be able to log in. Once logged in, the user's personal security record determines the system privileges and application programs that they can access and run.

DRA Web2 prompts users either to login or to enter as a guest. Users who login must enter their library ID (this may be a student ID, social security number, barcode number, etc., depending on Library choices) and a valid PIN. The DRA system provides a variety of mechanisms for assigning the initial PIN. DRA Web2 then uses the library patron database for authentication purposes. Patrons who log in may have additional features available to them such as the ability to view their own patron records and the ability to place requests. DRA has also developed features that allow users to identify themselves in order to have additional library-defined options such as access to specific third-party databases or other functions.

The "guest" option is provided so that searchers who wish to look at the library's online catalog but who are not authorized library patrons may still view the basic library catalog. This option may be made available both within the library and for searchers accessing the library via Internet.

Each user is required to login via our login server. This facility provides user authentication for all Taos transactions.

In the Policy Employees text file you store the properties of your employees by creating and listing the login names and categories for each employee with access to the Cataloging, Circulation, Serials, or Acquisitions clients. You may use login names that are specific to individuals (kjones for example) or login names that apply to a group of people that share the same privileges and access rights (circclerk for example). You can then use these categories to control access rights to various Taos functions. There is no limit to the number of employee names or categories.

All password information sent via Taos client applications is encrypted. Libraries may elect to use SSL for Web applications if desired. DRA is also uses Iona's Orbix SSL for additional data encryption. Iona's Orbix product, which DRA uses for our CORBA support, is compatible with other security protocols, such as Kerberos.

In Web2, the "Security Violation" message normally indicates that a hacker attempted to access information on your web site that they should not be allowed to see. Web2 can detect the attempt and deny the request. When this happens it logs information to help determine the source of the attack.

The fact that the remote host and remote addr's contain 'X's rather than a valid IP information tends to support the theory that this came from a hacker, and is not simply an accident by a legitimate user.

Hardware Security Considerations

Basic goals for hardware security to protect your library's investment should include prevention of theft of and/or damage to equipment; denying access to the power source; and denying access to your system software. The library's goal should be to secure its system hardware, while maintaining user functionality. The libraries may wish to consider the following security measures:

Hardware: Physical
- Physically chain or bolt the PC to its desk.
- Use a labyrinth - a frame that you slide a PC into and then lock.

Hardware: Virtual
- Prevent changes to the BIOS password by setting up a BIOS password in C-MOS.
- Disable the floppy drive through BIOS setup to prevent virus infection.
- Install a boot password, so that only authorized staff can reboot public devices.

Operating System
- Store critical files on the server rather than on the PC hard drive.
- Create privileged accounts so users can only perform certain functions.
- Secure the file system.
- Install virus scanning on each device, such as McAfee Virus Scan or McAfee Net Shield.

Network Security
- Require domain logins. A domain is a database of users which is controlled by domain servers.
- An NT Server allows central management of users so that user profiles and login scripts could be created.

Passwords
Using system passwords is the best front end to secure the system. Use gibberish "words" up to 68 characters in length and make the passwords expire at least every 60 days. This makes it harder for hackers. Use account lockouts, i.e. after a certain number of login failures, the user is locked out for a period of time.

Auditing Logs
Monitor the auditing logs. This will tell you who is logging in and what files they are accessing. It will also record alerts of login failures and break-in attempts.

HTTP Server
Remove any unnecessary protocols. For example, if you won't be using FTP, HTTP, telnet, disable them.

If using HTTP, define attributes to control read/write access. Control the access ports by changing the default port 80 to another port (as long as that port is not in use). That way, people cannot guess where your Web server is.

Preventive Maintenance
Backups are the best defense against damage. Keep some backups off-site in case of damage to the building. Test the restoration of your backup data periodically to make sure you can restore the data.

2.9 Documentation

Documentation Describe any documentation that is included with the system and provide samples of this documentation. Vendor should also state if other additional documentation is available and the cost for that documentation.

DRA documentation is available for viewing, searching, printing and downloading at our Customer.DRA.com web site in PDF format. DRA also distributes a full set of documentation on every Taos CD that is shipped. "Doc Only" access to Customer.DRA.com can be purchased for a minimal fee for any number of users beyond the four designated Help Desk contacts. Documentation may be copied and modified locally, however these customizations will not be supported by DRA and DRA libraries are required to protect the proprietary nature of the documentation.

2.10 Support of Other Languages

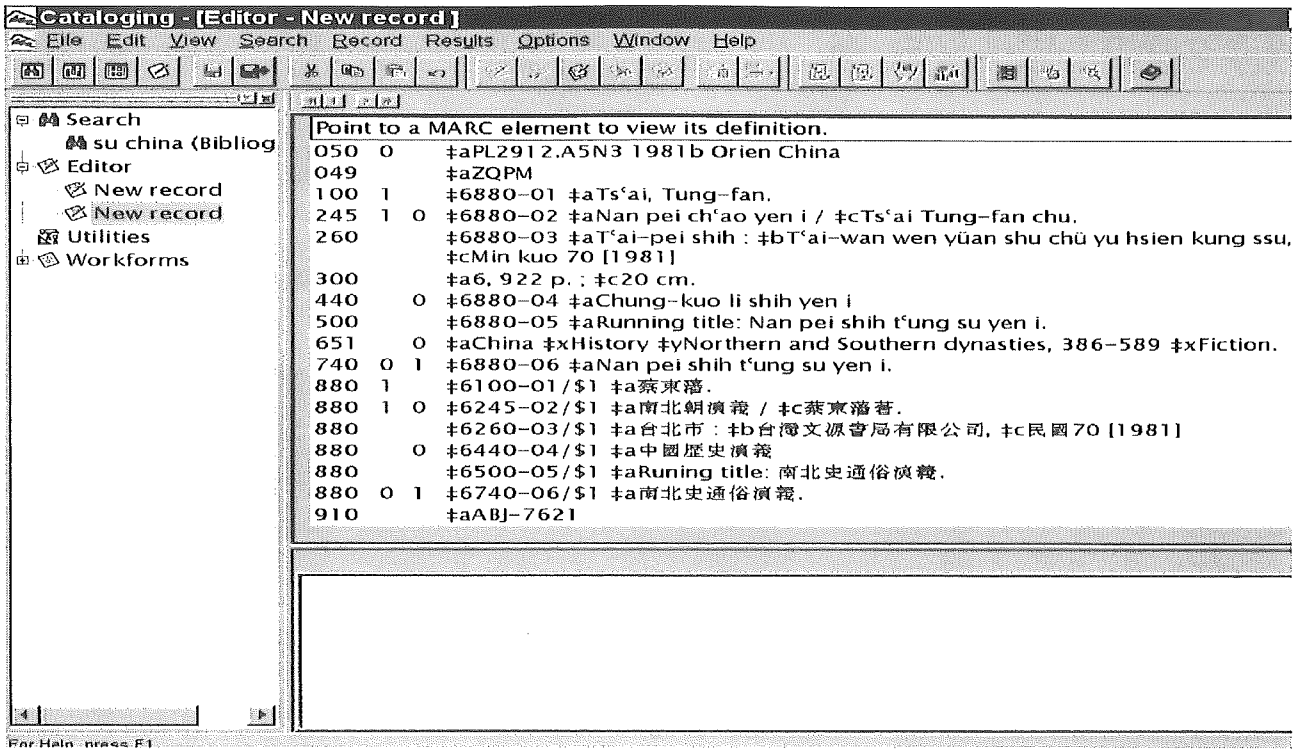
Support of Other Languages **The vendor must list the languages their system supports. The vendor must clearly indicate on the Cost Page any additional cost for these languages.**

The basic installation of DRA Web2 (OPAC) offers three language interfaces: English, French, and Spanish. DRA Web2 also provides sites with the capability to create as many additional interfaces (foreign language, text-based, etc.) as desired.

An excellent example of multiple language interfaces may be viewed at Queens Borough Public Library's Web2, http://web2.queens.lib.ny.us/ with their Chinese, Japanese and Korean interfaces.

On the following page is a sample Taos Cataloging screen print, demonstrating a Chinese interface.

Sample Taos Cataloging screen print demonstrating Chinese language interface:


Cataloging - [Editor - New record]
File Edit View Search Record Results Options Window Help
Search
su china (Bibliog
Editor
New record
New record
Utilities
Workforms
Point to a MARC element to view its definition.
050 0 ‡aPL2912.A5N3 1981b Orien China
049 ‡aZQPM
100 1 ‡6880-01 ‡aTs'ai, Tung-fan.
245 1 0 ‡6880-02 ‡aNan pei ch'ao yen i / ‡cTs'ai Tung-fan chu.
260 ‡6880-03 ‡aT'ai-pei shih : ‡bT'ai-wan wen yüan shu chü yu hsien kung ssu, ‡cMin kuo 70 [1981]
300 ‡a6, 922 p. ; ‡c20 cm.
440 0 ‡6880-04 ‡aChung-kuo li shih yen i
500 ‡6880-05 ‡aRunning title: Nan pei shih t'ung su yen i.
651 0 ‡aChina ‡xHistory ‡yNorthern and Southern dynasties, 386-589 ‡xFiction.
740 0 1 ‡6880-06 ‡aNan pei shih t'ung su yen i.
880 1 ‡6100-01/$1 ‡a蔡東藩.
880 1 0 ‡6245-02/$1 ‡a南北朝演義 / ‡c蔡東藩著.
880 ‡6260-03/$1 ‡a台北市 : ‡b台灣文源書局有限公司, ‡c民國70 [1981]
880 0 ‡6440-04/$1 ‡a中國歷史演義
880 ‡6500-05/$1 ‡aRuning title: 南北史通俗演義.
880 0 1 ‡6740-06/$1 ‡a南北史通俗演義.
910 ‡aABJ-7621
For Help, press F1

2.11 Brief Description of Each Module

Brief Description of Each Module **This section must contain a list of all modules and the functionality they provide. Vendor should note any special features their modules contain. The vendor should also state whether any modules require other modules in order to function properly.**

The following information is also required for the following modules:

PAC Searching: Vendor must explain how their software performs searches, describe the search architecture, and indicate how many and what fields are searched for author, title, and keyword searches.

Holds: Vendor must explain how materials that are available in another location/branch can be placed on hold. Is a daily report available that lists these holds with available copies that could be printed by each location so shelves can be checked for available copies? Can FCPL elect to print notices for other holds, but not these holds?

Inventory: Vendor must describe the inventory process. What steps are involved? Is any special equipment necessary?

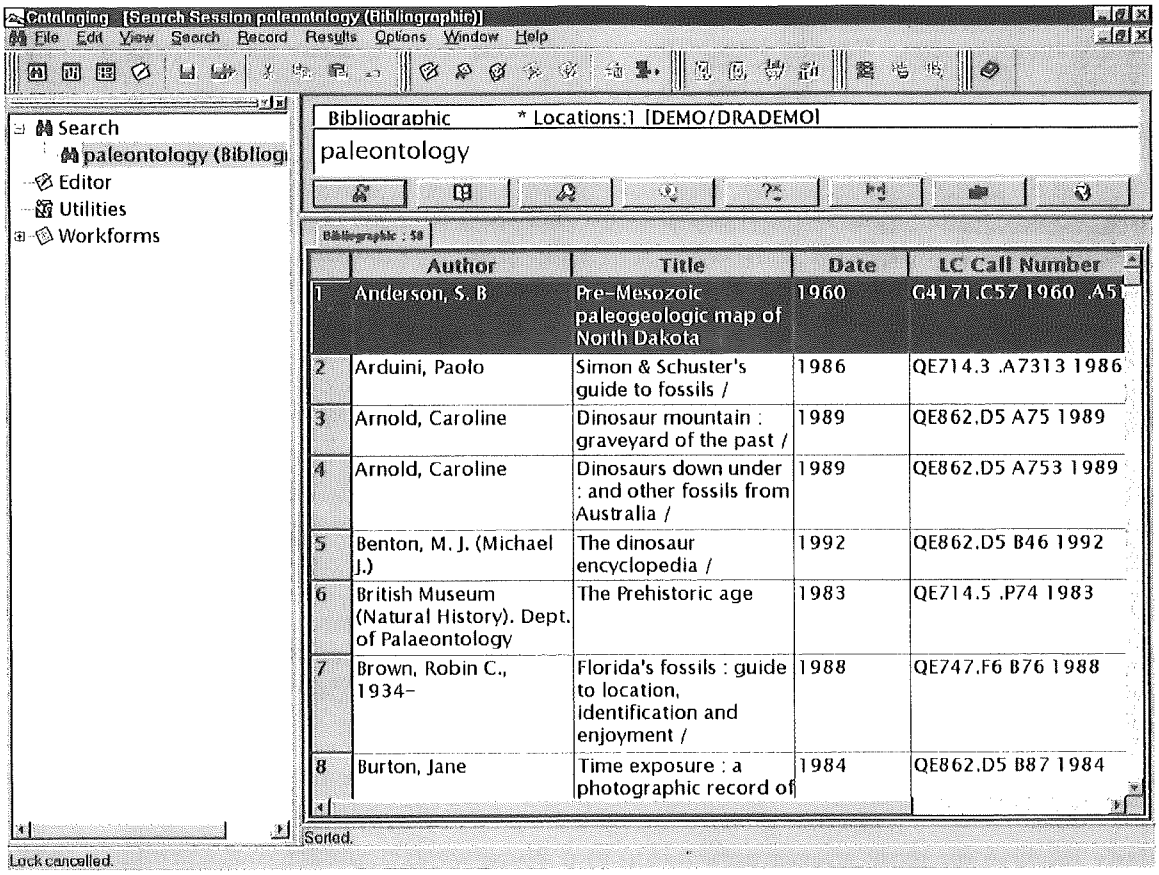
Acquisitions: If the vendor submits a bid for the Add Alternate for this module they must provide the number of templates that FCPL could establish with the proposed system. Can records be transferred between their Acquisitions module and Peoplesoft Purchasing and Accounting Software?

Taos Cataloging

Particularly intuitive for those already accustomed to a Windows environment, our Cataloging module incorporates standard Windows functions to let you, for example: copy and paste into multiple records, edit multiple records simultaneously, move through separate functions quickly and easily, and take advantage of context-sensitive help and editing assistance features. Full screen editing of bibliographic and authority records allows you to click on the field you want to edit and input the new text while viewing a full screen of the record. Functionality includes:

- The ability to edit records with MARC tags or in a labeled format. Labels are library-defined and map one-to-one to MARC tags/subfields, MARC tags/indicators or MARC control fields/positions.
- An undo function is available while a record is being edited (before edits are saved). There is no limit to the number of undos you can use.
- Record locking: The record is "locked" while it is being edited so another staff member will not be able to edit the same record at the same time.
- Context-sensitive help in a Windows format is available for MARC tags, subfields, indicators, control fields and values. The user can display the help window on the screen at the same time the editing screen is displayed, and click between them.
- Taos has the ability to verify a field under authority control.
- Barcodes, locations, and coded information (e.g., patron types, material types, etc.) are validated.
- Records are indexed as they are saved.
- Z39.50 capabilities so, for example, with appropriate account information, you can use Taos Cataloging to connect to a bibliographic utility such as OCLC and bring records in directly.

Below is a Taos Cataloging screen print illustrating a retrieved result set sorted by author.


Cataloging [Search Session paleontology (Bibliographic)]
File Edit View Search Record Results Options Window Help
Search
paleontology (Bibliog
Editor
Utilities
Workforms
Bibliographic * Locations:1 [DEMO/DRADEMO]
paleontology
Author
Title
Date
LC Call Number
1 Anderson, S. B Pre-Mesozoic paleogeologic map of North Dakota 1960 G4171.C57 1960 .A5
2 Arduini, Paolo Simon & Schuster's guide to fossils / 1986 QE714.3 .A7313 1986
3 Arnold, Caroline Dinosaur mountain : graveyard of the past / 1989 QE862.D5 A75 1989
4 Arnold, Caroline Dinosaurs down under : and other fossils from Australia / 1989 QE862.D5 A753 1989
5 Benton, M. J. (Michael J.) The dinosaur encyclopedia / 1992 QE862.D5 B46 1992
6 British Museum (Natural History). Dept. of Palaeontology The Prehistoric age 1983 QE714.5 .P74 1983
7 Brown, Robin C., 1934- Florida's fossils : guide to location, identification and enjoyment / 1988 QE747.F6 B76 1988
8 Burton, Jane Time exposure : a photographic record of 1984 QE862.D5 B87 1984
Sorted.
Lock cancelled.

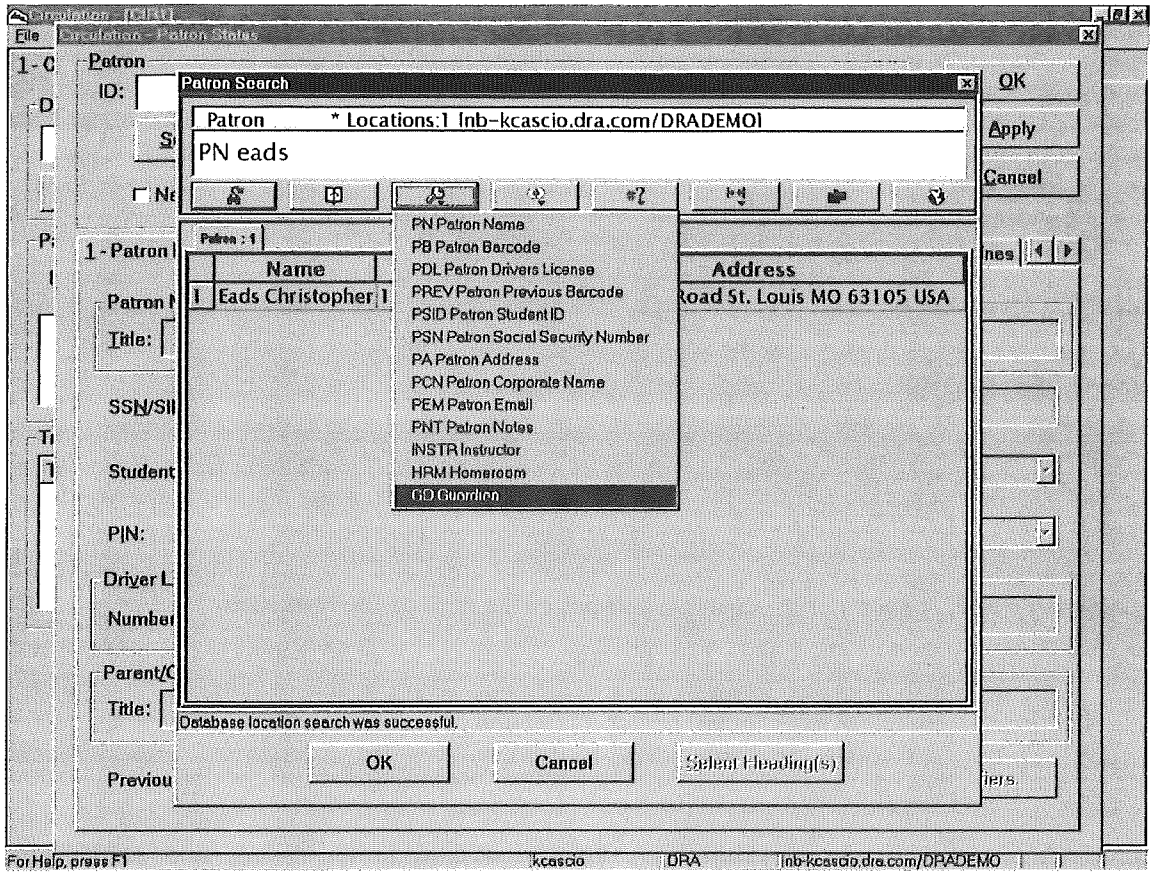
Taos Circulation

Our Taos Circulation module is designed specifically for the high-volume workflow that is characteristic of any busy circulation desk. For example, its features include:

- Mouseless operation — a keyboard equivalent for every action
- A simple interface, with large, clear fonts for easy readability
- A workflow that enables rapid learning of basic functions
- Simple and rapid navigation — the ability to move between functions without switching menus
- Accessibility to different functions customizable for each user
- Virtually unlimited notes fields
- An on-line, month-at-a-glance calendar for handy date selection
- Off-Line Backup Circulation
- Reserve Book Room functionality (planned for December 2000)
- Request queues and notification

In addition to the product's ease of use, the Taos Circulation module also boasts a high degree of functionality, including the ability to "relate" patrons, such as professors/students, family members or homebound and their sponsors, and to easily support activities such as collection exchange and traveling collections. Taos Circulation also takes advantage of ISO-compliant ILL functionality.

In the following Taos Circulation screen print, staff can update data in borrower records by pulling up a borrower in the Patron Status window using the patron barcode or by searching for a patron using Taos keyword searching capabilities.



Inventory Control

The Taos Inventory Control program will be provided at no extra cost with the Circulation module, allowing you to easily inventory your collections and locate any mis shelved items. Prior to running the program, library staff will use portable barcode readers with memory to read the item barcodes for a given section of the library. The resulting information is loaded into the system, creating a file. The Inventory Control program compares this file to the item file, and then generates exception reports detailing:

- Items are on the shelf but have the status of claims lost, assumed lost, missing, charge, route, or claims returned.
- Items which belong to another location.
- Items which should have been on the shelf (based on their status) but were not.
- Misshelved items. (This information appears in the log and is an option; it is not contained in a separate report.)

Holds

When a "Hold" is requested, the system attempts to fill it with an available item based on the Request Cutoff Parameters in the Taos Policy File. The first request cutoff is the number of days during which the system tries to fill the request within the same agency (branch). After the first cutoff date, the request may be filled by an item from the same library system as the pickup agency. The second request cutoff is the number of days that must pass before the system attempts to fill the request with any available copy without regard to the library system. In addition, specific items can be given the status of local request which means they will only be used to fill requests placed at the owing location. This status can be removed at the Library's discretion.

The Taos system tracks materials selected to fill Hold requests in a number of ways. First, if an available item is trapped to fill a request, it is listed on that location's Send Item List, which gives the title, call number, volume/copy number, barcode, material type, status, current location, send to location, reason, and patron name. The library locates the proper item, highlights it on the Send Item List, and hits the Route button. A message displays on the screen (and may also print at the library's option) that tells the library what to do with the item.

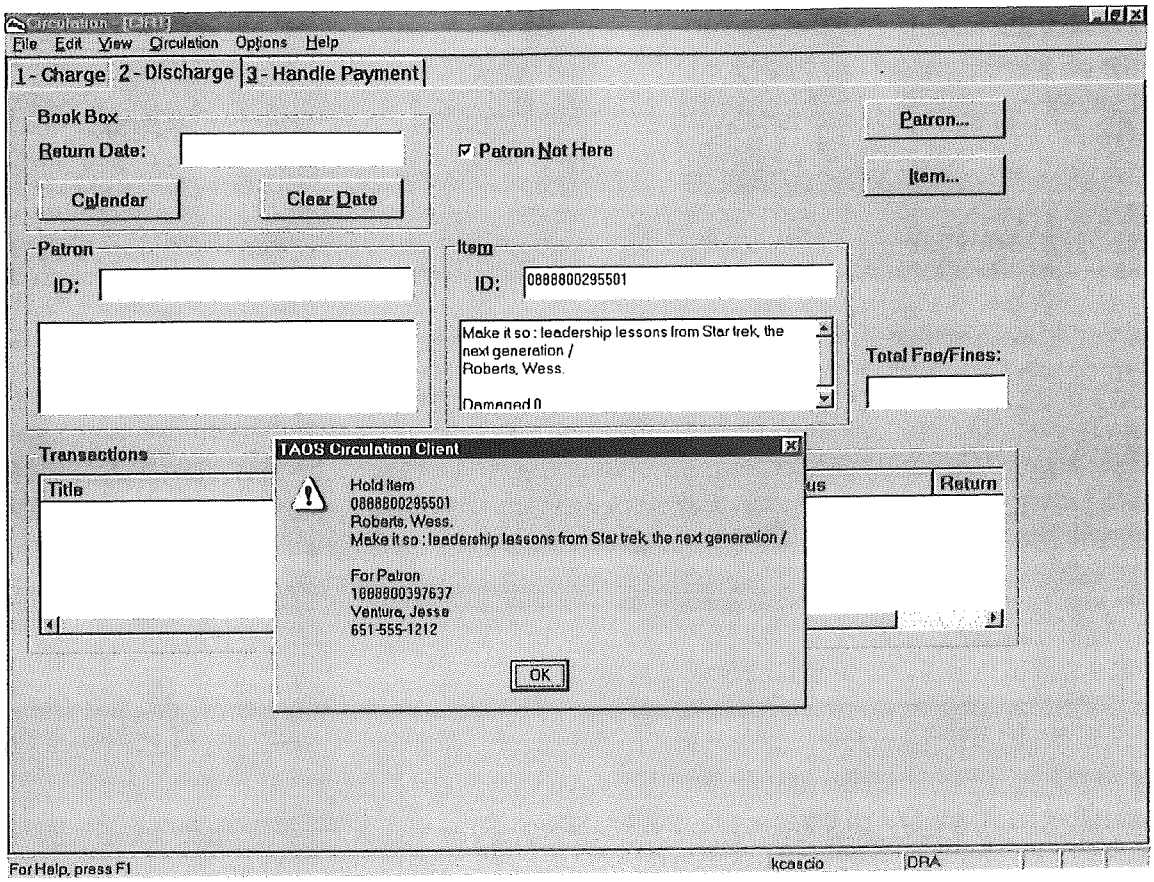
If the pickup location for the request is the same location, a Hold notification slip is printed and the staff places the item on the hold shelf for the student. If the pickup location is different from the location that is routing the item, a routing slip is produced that tells the staff to send the item to its pickup location. Should the routed item end up at a location other than the pickup location, a message tells staff to continue routing the item to the pickup location. Once the item reaches the pickup location, the hold notification slip displays and/or prints, and the staff places the item on the hold shelf.

Qualified staff may view the Send Item List for other locations to track materials through the routing process. Each item also contains location information that displays the owning, permanent, active, previous, and next locations for the item, as well as a temporary location should the item be on temporary loan to a different agency within the system. This is also where the ILL location will display should the item be used to fill an ILL request.

Patrons can also enter requests for Holds from Web2 by looking up the desired title, clicking on the Request option and entering a patron ID (if this was not entered at the beginning of the session). The request is automatically processed. When the title becomes available, the system produces a notice to inform the patron. The patron may view the status of requests, or cancel their requests in DRA Web2 by identifying him/herself with Library card number and PIN.

The ability to inform the user of the number of outstanding holds on a title is planned functionality for Taos. The Taos system currently displays the number of copies of the title both on-site and at other library locations Taos staff modules also display the total number of holds on a given title.

The following Taos Circulation screen print depicts a hold shelf slip containing the item ID, author, and title, as well as the patron ID, name, and phone number. A routing slip will also state the location to which the item should be sent.



Taos OPAC (Web2)

Taos' OPAC, called Web2, is a fully functional web-based OPAC. It may be used via any one of several web browsers. It offers the ability to simultaneously search multiple bibliographic databases, request titles, view/edit patron information, submit suggestions to the library, and view information about the library.

Web2 is a highly customizable product. Demonstrations of the Web2 system, and many of our customers' implementations of Web2, are available at www.dra.com. We encourage you to try Web2 at this site. The default Web2 comes with easy and advanced search methods. The user may just type his/her search and press "Enter." The default "Keyword" search will return a hit list of results.

Frederick County Public Libraries may also wish to construct search methods suitable for your libraries' needs. Indexing may be performed on any field/subfield of the MARC record. Each library may request its own specifications for indexing.

In Web2, search functionality includes: browse searching (e.g. by author, title, subject); keyword on any field; keyword on author, title and subject; Boolean, proximity, nesting, phrase, internal and external truncation. Searches may be limited by location, language, material type, dates and date ranges. It is possible to search multiple databases simultaneously via Z39.50 and CORBA protocols with subsequent de-duping and merging the results. One can also use FCPL qualifiers, such as AU for author, TI for title, etc. Keyword search constructors will help the user to create a complex query with CCL qualifiers, parenthesis, Boolean operators, etc.

With its ability to completely customize Web2 to suit your library, Web2 offers a multitude of fully comprehensive search capabilities. One of the more notable is "fuzzy matching." This feature suggests name rotations for author searches and leading article suppressions for title searches. With name rotation, if the patron enters "Mark Twain" and no results are found, Web2 will then suggest "Twain Mark." Leading-article suppression for title searches removes the initial article from unsuccessful searches. If the patron enters the title *The Cognitive Paradigm*, and no results are found, Web2 will suggest *Cognitive Paradigm*. By rotating names and dropping the leading article, searches are likely to yield better results.

Additional Taos Web2 features include:

- The ability to allow the library to specify its own default Boolean operators for different types of keyword searches.
- The ability to limit by location on keyword searches.
- Status information from the search sent back to Web2 for display. If a term is dropped from the search, Web2 will be able to indicate that to the patron. If a limit is too complicated, appropriate information will be provided back to the server.
- Language-based query parsing (e.g. "et" equals "and" in some circumstances).
- Keyword on Heading which represents a keyword view of the headings, rather than the records. It is a convenient way to summarize search results in very large databases in which keyword searching of common subject entries (for example, "HISTORY") produces extremely large sets. It is best understood through demonstration. We believe this feature to be unique in the industry.

DRA Web2 also permits the transparent and simultaneous search of multiple databases. Once retrieved, users may merge multiple result sets into a single hit list. The site may specify the maximum number of records that may be merged. Users may also sort hit lists (merged or otherwise) according to author, title, subject, material type, date ascending, and date descending. Again the site may specify the maximum number of records that may be sorted. Users may also review and refine previous searches as desired.

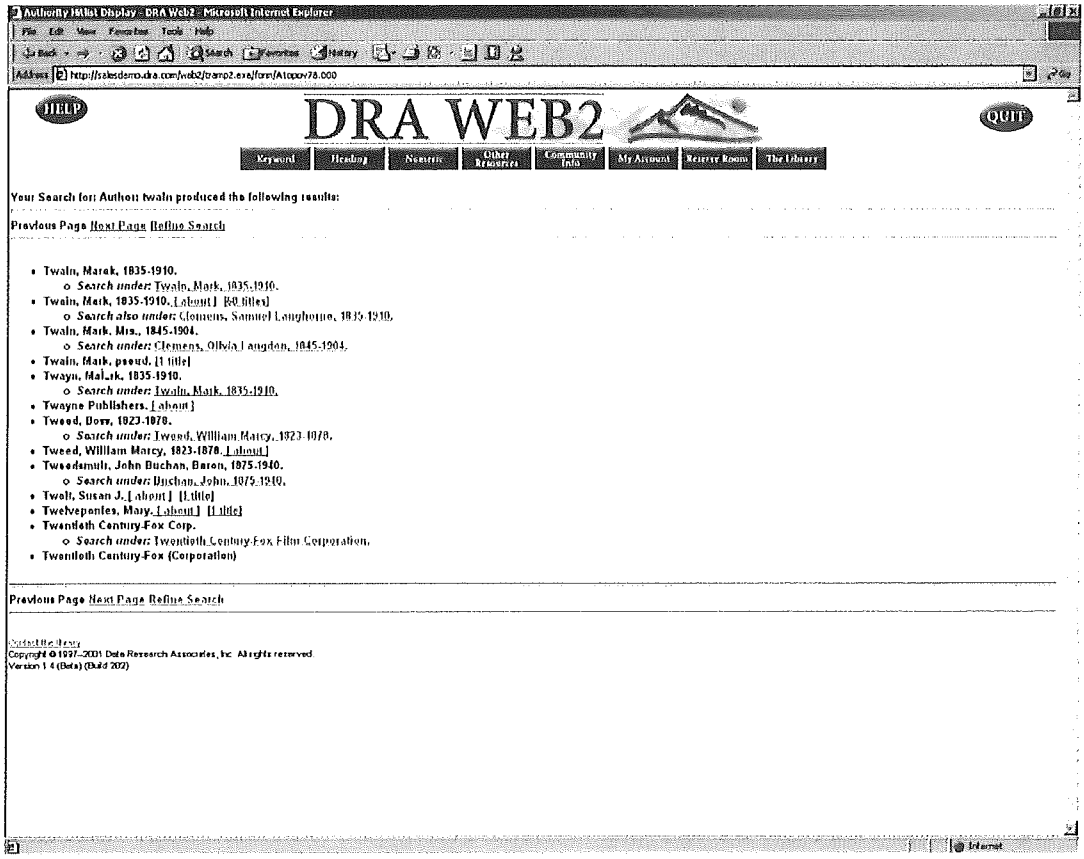
The basic installation of DRA Web2 currently offers three language interfaces: English, French, and Spanish. DRA Web2 also provides sites with the capability to create as many additional interfaces (foreign language, text-based, etc.) as desired.

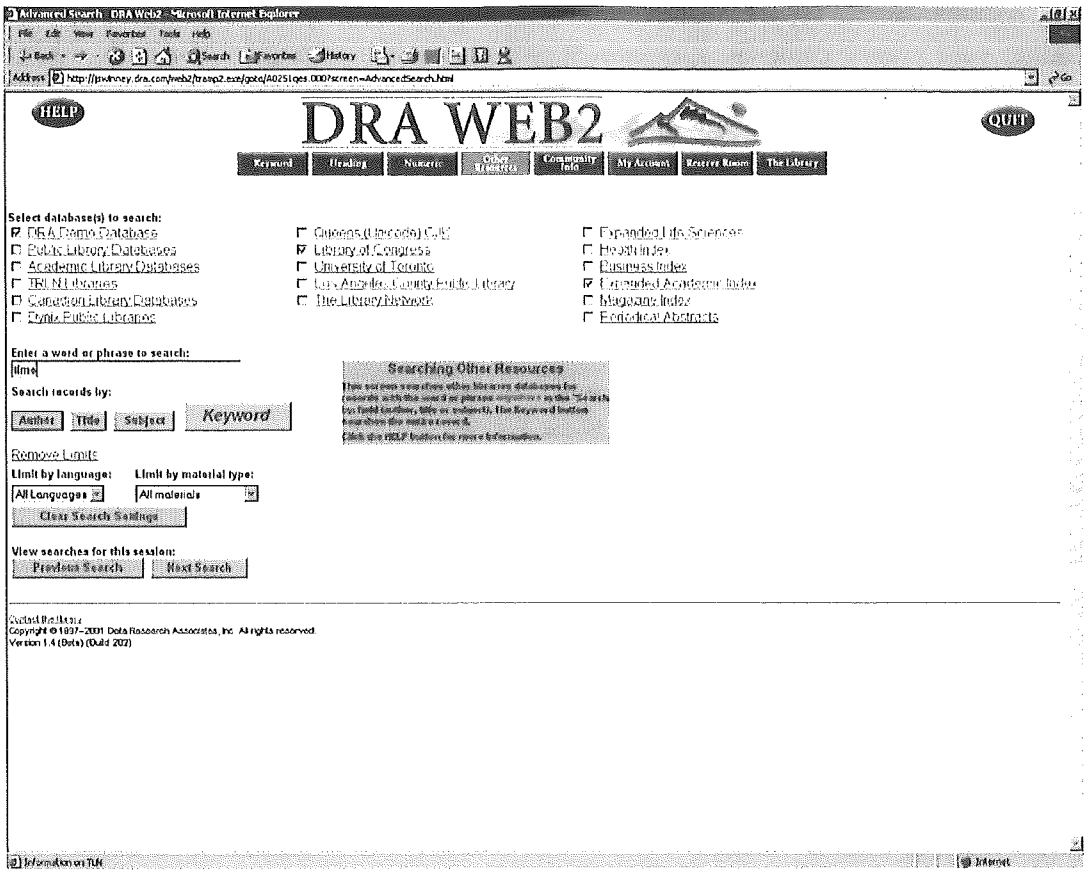
Web2 comes with two powerful help options. A help link embedded into each page forwards you to a web-based help page. You can also receive context-sensitive windows based help on each page. This option eliminates the need to go back to previous screens once you have the needed information. With both forms of help you have the ability to get help specific to your needs. DRA's online training and support will allow your staff to quickly learn Web2, optimizing their time completing library tasks.

The Web2 interface is based on HTML, which makes changing its "look" almost effortless. The Web2 "look" can reflect your library, community, or current projects you are promoting. Graphics are easily inserted, and buttons changed, as well as added to increase information available to users. The ability to customize the Web2 interface is a powerful tool that will continue to promote your library as well as make the entire product as user-friendly as possible because you can maintain a consistency in design. (Examples of Web2 customized library maps are included in Part 6.1.27.)

Having the interface based on HTML technology allows for flexibility on your part. This web-based technology allows for you to make any quick informational changes, or you can have DRA customize all of the features for you for a fee. Innately flexible, Web2 suits a variety of library types.

On the following page are two sample Web2 screen prints, illustrating a typical Item Holdings display, and the ability to access a wide variety of databases using Web2.


DRA WEB2
HELP
QUIT
Keyword
Headings
Numeric
Other Resources
Community Info
My Account
Reserve Room
The Library
Your Search for: Author twain produced the following results:
Previous Page Next Page Refine Search
Twain, Marek, 1835-1910.
Search under: Twain, Mark, 1835-1910.
Twain, Mark, 1835-1910. [About] [80 titles]
Search also under: Clemens, Samuel Langhorne, 1835-1910.
Twain, Mark, Mrs., 1845-1904.
Search under: Clemens, Olivia Langdon, 1845-1904.
Twain, Mark, pseud. [1 title]
Twayn, Mark, 1835-1910.
Search under: Twain, Mark, 1835-1910.
Twayne Publishers. [About]
Tweed, Boss, 1823-1878.
Search under: Tweed, William Marcy, 1823-1878.
Tweed, William Marcy, 1823-1878. [About]
Tweedsmuir, John Buchan, Baron, 1875-1940.
Search under: Buchan, John, 1875-1940.
Twelt, Susan J. [About] [1 title]
Twelveponies, Mary. [About] [1 title]
Twentieth Century-Fox Corp.
Search under: Twentieth Century-Fox Film Corporation.
Twentieth Century-Fox (Corporation)
Previous Page Next Page Refine Search
Copyright © 1997-2001 Data Research Associates, Inc. All rights reserved.
Version 1.4 (Beta) (Build 202)

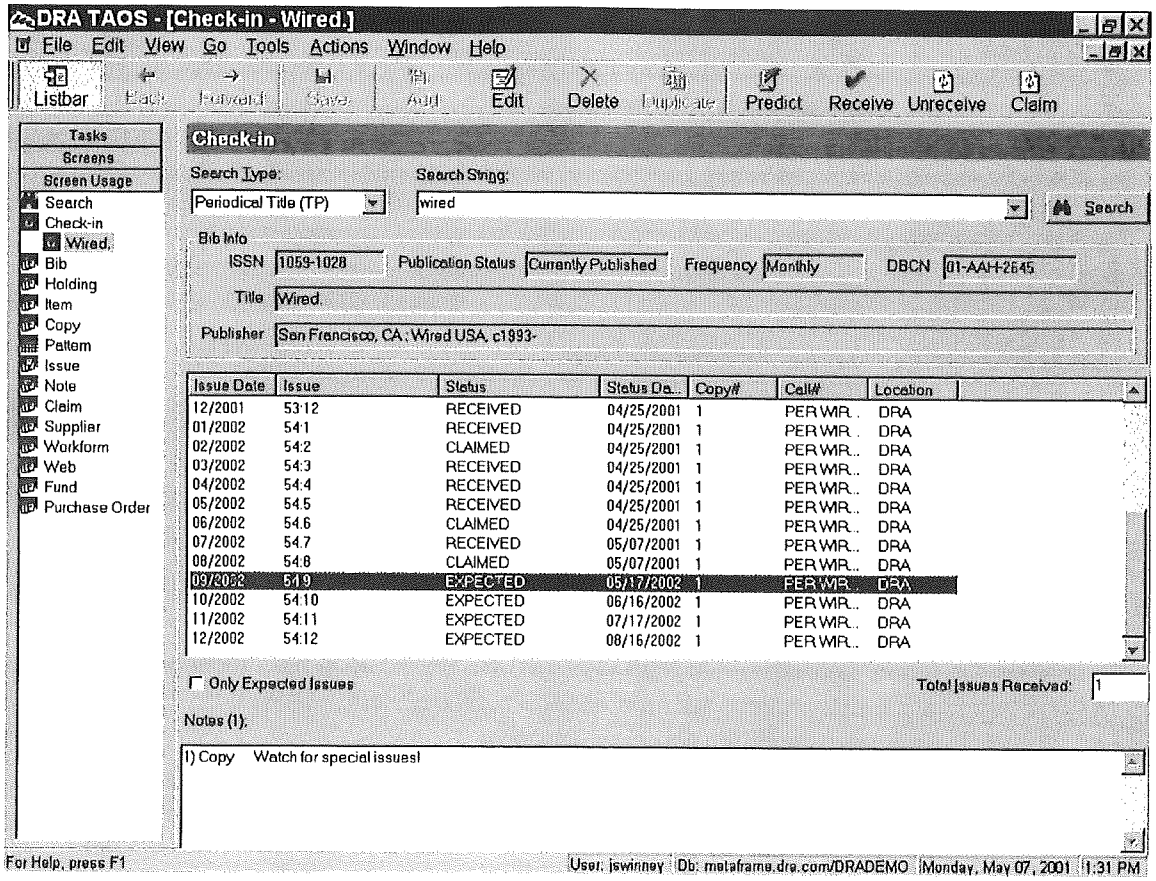


Taos Serials

The Taos Serials module provides comprehensive support of the myriad details that must be tracked at the Serials Desk:

- Effortless management of a high volume of transactions
- Prediction feature smoothly handles complex patterns
- Automatic claiming
- Automatic updating of holdings (full detail, summary, or static)
- Seamless interface with acquisitions, vendor files, and MARC records for claiming and binding
- Includes the ability to extract data for exporting into other systems
- Optional label production and bar-coding at check-in
- Bindery handles serials and non-serials (in development 12/01)
- SISAC check-in (in development 2001)
- Cataloging functionality such as MARC editing and searching
- Simple and advanced search screens
- Automatically carry over objects from one screen to the next
- Access to Acquisitions screens while working in Serials

Below is a sample screen print of the Check-in for Taos Serials:


DRA TAOS - [Check-in - Wired.]
File Edit View Go Tools Actions Window Help
Listbar Back Forward Save Add Edit Delete Duplicate Predict Receive Unreceive Claim
Tasks
Screens
Screen Usage
Search
Check-in
Wired.
Bib
Holding
Item
Copy
Pattern
Issue
Note
Claim
Supplier
Workform
Web
Fund
Purchase Order
Check-in
Search Type:
Periodical Title (TP)
Search String:
wired
Search
Bib Info
ISSN 1059-1028
Publication Status Currently Published
Frequency Monthly
DBCN 01-AAH-2645
Title Wired.
Publisher San Francisco, CA : Wired USA, c1993-
Issue Date | Issue | Status | Status Da... | Copy# | Call# | Location
12/2001 | 5:12 | RECEIVED | 04/25/2001 | 1 | PER WIR. | DRA
01/2002 | 5:1 | RECEIVED | 04/25/2001 | 1 | PER WIR. | DRA
02/2002 | 5:2 | CLAIMED | 04/25/2001 | 1 | PER WIR.. | DRA
03/2002 | 5:3 | RECEIVED | 04/25/2001 | 1 | PER WIR.. | DRA
04/2002 | 5:4 | RECEIVED | 04/25/2001 | 1 | PER WIR.. | DRA
05/2002 | 5:5 | RECEIVED | 04/25/2001 | 1 | PER WIR.. | DRA
06/2002 | 5:6 | CLAIMED | 04/25/2001 | 1 | PER WIR.. | DRA
07/2002 | 5:7 | RECEIVED | 05/07/2001 | 1 | PER WIR.. | DRA
08/2002 | 5:8 | CLAIMED | 05/07/2001 | 1 | PER WIR.. | DRA
09/2002 | 5:9 | EXPECTED | 05/17/2002 | 1 | PER WIR. | DRA
10/2002 | 5:10 | EXPECTED | 06/16/2002 | 1 | PER WIR.. | DRA
11/2002 | 5:11 | EXPECTED | 07/17/2002 | 1 | PER WIR.. | DRA
12/2002 | 5:12 | EXPECTED | 08/16/2002 | 1 | PER WIR.. | DRA
Only Expected Issues
Total Issues Received: 1
Notes (1).
1) Copy Watch for special issues!
For Help, press F1
User: lswinney Db: metaframe.dra.com/DRADEMO Monday, May 07, 2001 1:31 PM

Taos Acquisitions

Upon completion (scheduled for the fourth quarter of 2001), DRA Taos Acquisitions will streamline the firm ordering, invoicing, and receiving procedures for library materials within a familiar Windows environment. Taos Acquisitions delivers high performance through streamlined ordering of library materials. Staff will be able to initiate simple OPAC searches from most Acquisitions screens, using features such as keyword access to supplier, fund, preorder, purchase order, po line, invoice, invoice line, and receipt data. Plus, by storing the supplier record in a MARC-like format, Taos Acquisitions will allow staff to define the indexing and retrieval points for this particular record. Additional functionality will include:

- Management of complex fund hierarchies
- Unlimited lengths for each fund level
- Up to 20 fund levels per fund
- Unlimited number of funds for encumbrances and expenditures for single items
- Ability to conditionally activate amounts within a fund
- Ability to manually edit monetary fund fields
- Ability to automatically update monetary fund fields upon placement of firm order PO and payment of a debit Invoice
- View audit records for all fund/financial transactions
- Roll fund into next fiscal year

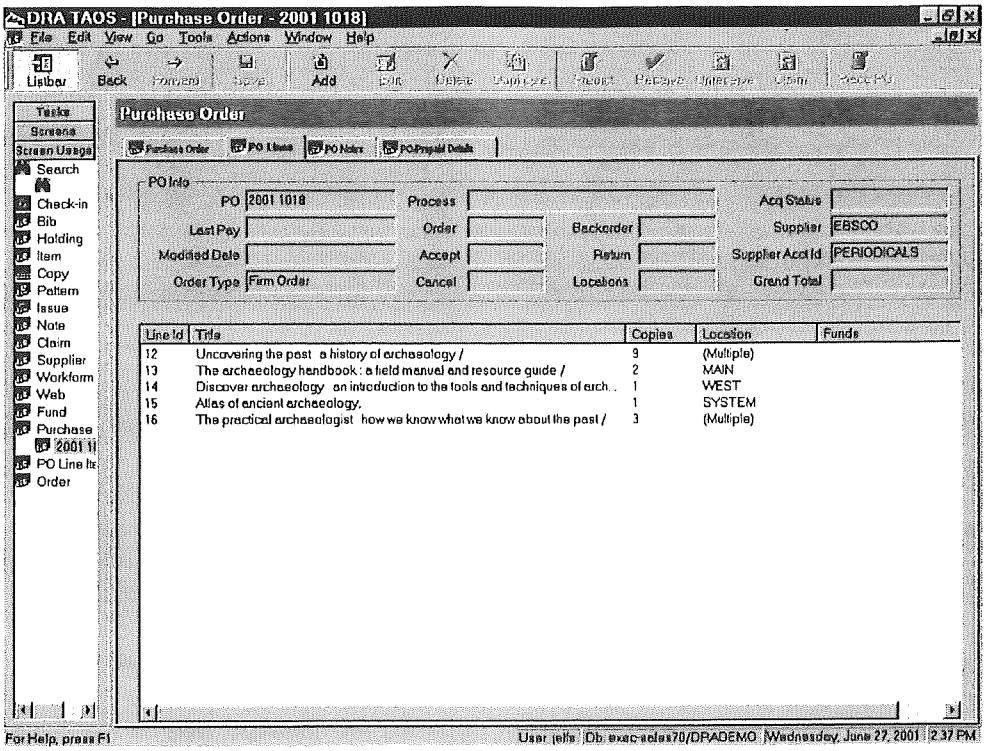
- Simple OPAC keyword searches for suppliers, funds, preorders, preorder lines, purchase orders, purchase order lines, invoice, and invoice lines
- Drop down menus choices for system and user defined fields
- Ability to use a calculator for most monetary values
- Ability to use a calendar for most date values
- Unique ids assigned to all fund, preorder, purchase order, and invoice records and these ids will be used to enhanced future EDI transactions scheduled for 2nd release of Taos Acquisitions.
- Flexible policies
- Integration of Logger file capabilities for Acquisitions records
- PreOrder lists for collaborative ordering among authorized staff
- Build PreOrder List into Purchase Order(s)
- Access to fund/supplier files at the point of entering fund/supplier name
- View MARC record before adding title(s) to Purchase Order(s)
- Ability to split an encumbrance across many funds
- Right click search options while viewing display only fields
- Upon placement of a firmorder purchase order, holding records are updated and/or created and non-barcoded item records are created
- Upon placement of a firmorder purchase order, newly created holding records are assigned the acqstatus of 'on order'
- View 'On Order' holding and/or item status(es) via Web 2 upon placement of PO
- Ability to place title requests for on order non-barcoded items via Web 2
- Ability to split an expenditure across many funds
- View 'Order Received' item status(es) via Web 2 upon payment of a debit Invoice
- Currency exchange feature for simple conversion
- Tax code feature

Because DRA provides a generic easy-to-use format for loading data, we do not need to develop unique loaders for each administrative system (e.g. Peoplesoft Purchasing and Accounting software).

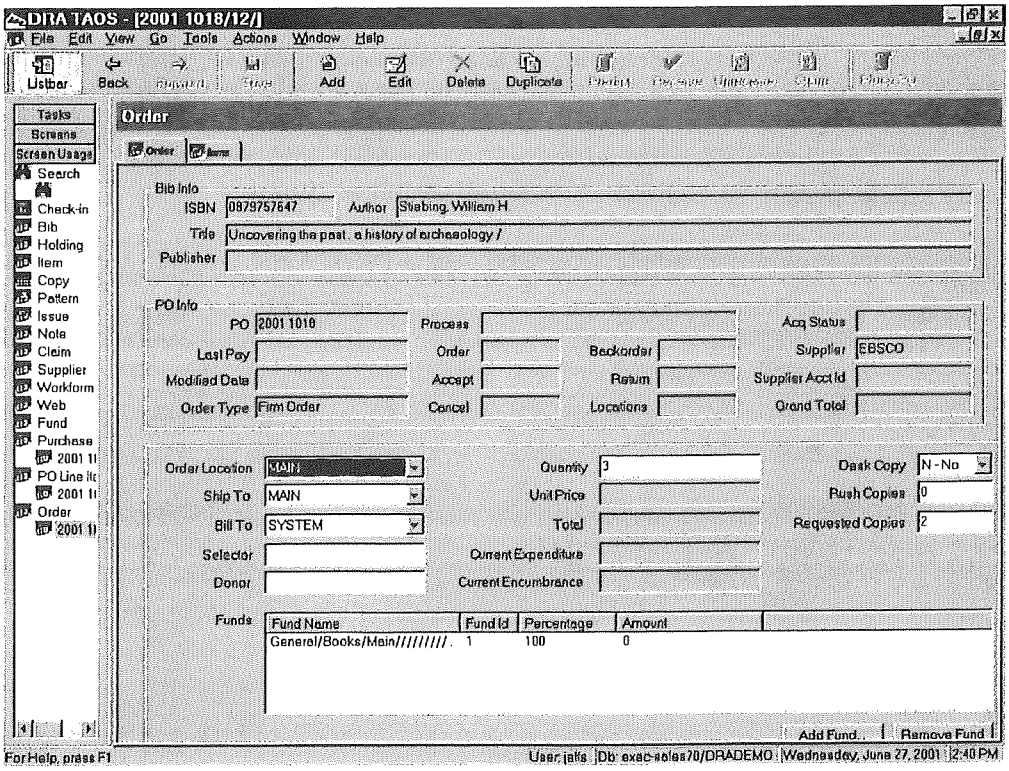
We can license the API (application programming interface) for mapping data between the financial system and Taos. This would require programming expertise on the library's part, as we are not in the business of forcing compliance with third-party financial systems. Several of our customers are planning to do this in order to get a real time transfer of financial information between the bursar's office and the library. Currently, we have a batch process that transfers this information.

On the following page are two sample Taos Acquisitions screen prints showing a purchase order and a line item order screen for a specific library location.

Sample Taos Acquisitions Screen: Purchase Order



Sample Taos Acquisitions Screen: Line item order for a specific location.



2.12 Community Information Database

Community Information Database **The vendor must provide copies of screens showing sample community Information records and indicate what search terms a patron would use to search for these records. The vendor must demonstrate that it would be easy to distinguish Community Information records from book and other records if the vendor is recommending one database. A description of the process for generating a report of these records that can be used for mailing to organizations must be included. A sample of this report should also be included.**

Access to Taos' Community Information Module is easily accomplished through the main menu access of Web2. Our Taos Community Information module is provided at no extra charge to our Web2 customers and a sample screen print is included below.

Easy for patrons to access and use, Taos' Community Information database may be searched by name, title, subject, and keyword -- by agency, program, subject and keywords. Numeric searching is also available as is Boolean searching.

Your Community Information records will be extracted from FCPL's Community Information database(s) in MARC21 (formerly USMARC) format. If FCPL has more than one Community Information MARC database, these databases may also be migrated to Taos. The data can be entered and then indexed on any chosen field. These records can be part of the bibliographic database and accessed by the staff or the public, or can be kept separate and accessed as a separate function.

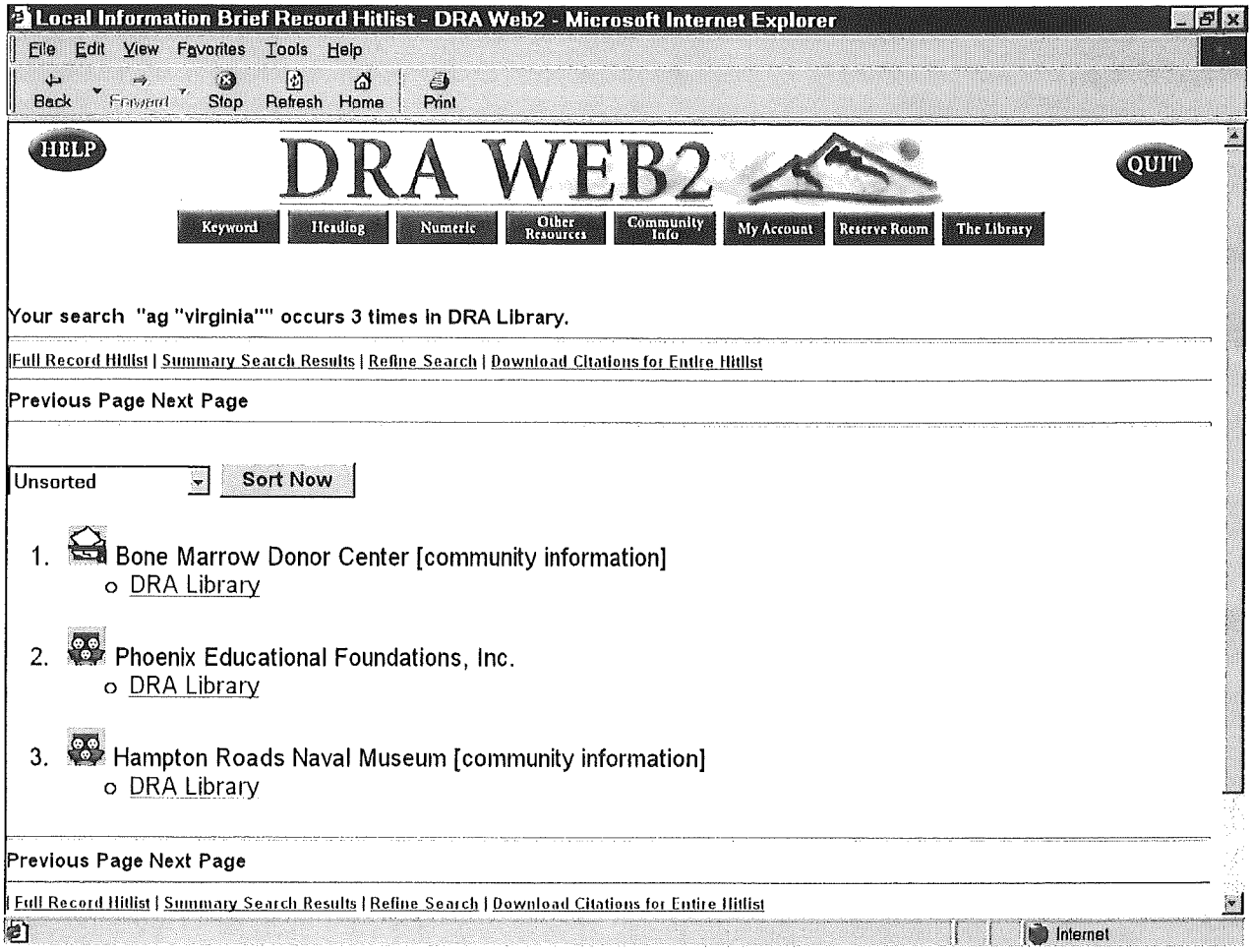
Using Report Writer, a copy of your Community Information database may be produced in printed format.

DRA Web2 training covers basic searching techniques, optional features and basic setup of the Community Information module.

DRA is currently in the process of preparing a Data Dictionary for the Community Information module. The Data Dictionary will be used by the Taos Standard Report Writer to report on Community Information data. The Taos System, both in terms of Cataloging and OPAC , supports the Community Information. We expect the Data Dictionary to be completed, and the subsequent ability to report on Community Information, to be available in the fourth quarter of 2001.

The following page provides a sample screen print of a DRA Web2 (OPAC) Community Information record.

A sample Web2 screen showing community information records in brief format. The first icon of a waiter's hand represents a service, while the icon of happy people represents an organization.


Local Information Brief Record Hitlist - DRA Web2 - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back Forward Stop Refresh Home Print
HELP
DRA WEB2
QUIT
Keyword Heading Numeric Other Resources Community Info My Account Reserve Room The Library
Your search "ag "virginia"" occurs 3 times in DRA Library.
Full Record Hitlist | Summary Search Results | Refine Search | Download Citations for Entire Hitlist
Previous Page Next Page
Unsorted
Sort Now
1. Bone Marrow Donor Center [community information]
o DRA Library
2. Phoenix Educational Foundations, Inc.
o DRA Library
3. Hampton Roads Naval Museum [community information]
o DRA Library
Previous Page Next Page
Full Record Hitlist | Summary Search Results | Refine Search | Download Citations for Entire Hitlist
Internet

2.13 Self Check Systems, Automated Telephone Renewal, and Book Security Systems

Self Check Systems, Automated Telephone Renewal and Book Security Systems The vendor must indicate if their software in compatible with self check out systems, automated telephone renewal list systems and book security systems and list each compatible system (e.g. 3M, Checkpoint, etc.). The vendor must also list which checkout receipt printers work best with their software.

Self Check Systems

The Taos system supports 3M SelfCheck and Checkpoint products for self-service, using 3M's SIP1 protocol. Taos' Self Check system allows library patrons to check out and renew items without staff intervention. The system includes checks to ensure that the patron is eligible for checking out or renewing items, and that the items are available to be charged or renewed.

Thanks to the total integration between the Taos Circulation module and the Self Check system, it is possible to verify the validity of the patron's library card and to instantly update the status of items being checked out or renewed. Simple menus on the Self Check system literally walk the patron through the check-out process.

Adoption of the 3M SIP2 protocol is in development and scheduled for release in the third quarter of 2001, which will add the capability for patrons to make payments to the library by debit or credit card. In SIP2, Personal ID Numbers (PINs) are also supported.

Automated Telephone Renewal

Our Telephone Notification software allows the system to dial phone numbers stored in patron records in order to deliver notices via an automated voice. This function allows patrons to call in and renew books by entering barcode numbers. It also allows patrons to check overdue items, list outstanding fines, and check to see what items are currently on hold for them.

The Automatic telephone renewal system will attempt to call a patron up to three times, based on patron-specific profiles that provide the time of day when the patron is most likely to be home to take the call. Overdue, fine and request notices can be relayed with this function, and written notices can be automatically sent to patrons who are unreachable after three attempts.

Book Security Systems

When used with the DRA interface, the 3M SelfCheck software incorporates security measures to prevent improper use of the system. It also demagnetizes books, magazines, and other non-video materials upon checkout, so that these materials can pass through security gates. The Self Check software also recognizes and avoids demagnetizing video materials to prevent damage to the material. Further, it ensures that the system is screen-independent, which means that customers can customize their screens, and allow screens to be updated in future releases without adversely affecting the system's operation.

Recommended Receipt Printers

The Star Micronics Dot Matrix Receipt Printer Model SP312 has been fully tested with the Taos system and is recommended by DRA. This affordable, high volume/high performance printer features drop-in paper loading, single or two-color printing, 3.1 lines per second print speed, the choice of tear bar or auto-cutter, and includes a three year manufacturer's warranty.

Other compatible receipt printers available for purchase through DRA include the low volume Star Micronics Models SP212 and SP312.

In general, the Taos system supports impact, laser, or thermal receipt printers via network or local connections, parallel or serial ports.

2.14 Reports

Reports **Vendors must describe the report generator. Of special interest is what reports are standard, can custom reports be made by the user, how easy is it to generate custom reports, how flexible is the report system, and is natural language queries used to build reports. Sample of standard and custom reports must be included.**

The vendor must also provide copies of daily circulation statistics showing items circulated, number of holds, and number of items renewed and the amount of money collected for a day showing the total amount collected, waived, etc.

The vendor must also describe how the number of materials used "in house" is collected and reported. It is preferable if these statistics could be collected using hand-held portable barcode readers or barcode scanners attached to workstations. The vendor must also provide sample statistical reports containing information gathered in this manner.

Taos Report Generator

Taos Standard Reports Generator provides predefined reports for gathering statistics and other management information, as well as a report writing facility for producing custom reports. Standard Reports are included with the DRA Taos system at no additional charge.

DRA's primary objective in developing the Report Writer for the Taos system was to enable the library's end-user to report on all the files and fields in the Taos software without DRA intervention. In Taos' Report Writer, all fields in the bibliographic, item and patron records may be used for collection of statistics. DRA provides special library-defined statistical category fields in the patron and item record so that libraries can enhance collection of their statistics through use of their own codes.

In-House Collection of Report Statistics

To facilitate the collection of report information, the Taos system is compatible with most standard barwands and printers. DRA would be pleased to provide a short list of printers and barwands/scanners that we sell and support; however, there are many other brands and models which can be used. We will be glad to offer assistance to the Frederick County Public Libraries in the testing of peripherals with the Taos system.

Taos Report Generator Features

Among the many standard functionality features in Taos' Report Generator are the following:

1. Modifiable headings. Headings that are associated with a given data element selected for inclusion in a report may be defined for individual reports.

2. Selectable and multiple level totaling/sub-totaling. The Taos report writer includes the ability to indicate which sets of values should be sub-totaled and or totaled.

3. Multi-field selectable sequencing. Both the fields that are to be included in a report and the order in which they appear may be specified on a report-by-report basis.

4. Facility to protect all standard report designs. Taos' report writer includes the ability to set permissions for access to a given report. Some operators may be able to run a report, while others

may actually be able to change the report criteria. "Clean" copies of standard reports may also be kept in a separate directory requiring access rights so that the base report is always available.

5. Facility to generate and save new report designs for repeated use, to generate one-off reports. A Taos report may be modified to include slightly different parameters.

6. Facility to copy existing report designs when creating new ones. Both standard Taos and custom reports may be copied in this fashion.

7. Facility to run reports immediately or scheduled to run at pre-set times.

8. Facility to view report prior to printing. Taos reports may be viewed on-screen and/or printed to a file for review prior to printing.

9. Ability to test print all specialized printouts (for example, overdue notices). Reports create files which may be printed once or repeatedly.

Sample Taos Reports and Notices

Copies of the sample Taos Reports and Notices requested above are provided in Part 4.4 Under "Additional Information". The following Standard Taos Reports are reproduced for your review:

Patron Reports
- Count of all patrons
- Count of added patrons by date
- Circulation by patron category – monthly, yearly, total
- Expired patron report
- Expired patron report by category
- Patrons in category

Circulation Reports
- Count of loans by patron category
- Patrons by category with materials checked out
- Report of items with status

Collection Development Reports
- Item count by material type
- Items in category
- Count of authority records
- Count of authority records by encoding level
- Count of holdings records
- Bibliography of titles at location
- Count of titles by record type and bibliographic level
- Items added with count by location
- Titles in a call number range
- New titles in the collection

Money Reports
- List of patrons with fines
- Borrower fine report
- Total fines levied and outstanding

Labels

Patron labels
Patron labels by birth date range
Patron labels by zip code

Notices

List of available notices
Notice format 8-1/2 x 11
Notice format postcard
Notice format self-mailer

Safari Report Writer

DRA also offers the optional Safari Report Writer, giving libraries virtually unlimited reporting capability. With Safari, libraries receive DRA's compatible Data Dictionary, which includes more than 8,000 fields and more than 80 files from which reporting data can be extracted. Essentially all files containing permanent data are included in this dictionary developed and provided by DRA. Safari Report Writer can also access data from desktop server applications with ODBC drivers, providing a broad range of data sources and the ability to export files to other formats such as HTML, .CSV, .TXT and .RTF.

Safari Report Writer offers a unique menu-driven GUI interface, with drag and drop features, with which staff can create and modify library reports. Easy-to-use layout features are based on fundamental Windows functionality, with which most staff are already familiar. Users can easily add visual effects, not seen in current report writers, thereby ensuring your library the most appealing, easy-to-understand, and comprehensive reports possible. Features include:

- Font formatting:
- Size
- Style
- Color
- Charting and graphing-formatting for:
- Line graphs
- Bar charts
- Pie charts
- Scatter graphs
- Gantt charts
- Drawing tools
- Data formatting
- Embedded Bitmaps (.TIF, .WMF and .BMP)
- Use of OLE compliant-applications to embed external documents with active links

Once a library has created the exact format and look desired, a desktop icon can be set up to run reports such as circulation, accounting, and collections. Once this icon is created, all that is needed is a simple click on that icon. The report will format itself, pull out all the relevant data from databases and display the final summary, making report writing as easy as the click of a button.

These GUI enhancements supplement the already impressive collection of report features available with the Safari Report Writer. Fourteen Qualifying Operators allow staff to precisely pare down the data they seek. Optional automatic formatting for columns and blocks, and the one-time file-linking feature serve to reduce redundant staff activity. Safari Report Writer can also access data from desktop server applications with ODBC drivers to provide a broader range of data sources, while offering your staff the ability to export files to other formats such as .HTML, .CSV, .TXT and .RTF. Lastly, multi-level report access allows system administrators to control who can view a report, who can run a report, and who has privileges to change a report.

Along with DRA Safari Report Writer, you also receive DRA's compatible data dictionary, including more than 8,000 fields and more than 80 files from which you can extract reporting data, as well as these standard amenities:

- Descriptions of all DRA files
- Sample views that allow the user to link files together for reporting for those times when you need information from more than one file in a report
- Suite of sample reports that include the "standard" reporting functions used by libraries in reports
- Generic records to enable a library to use a non-DRA file in their reporting process
- Sample generic records that can be optionally used by the library if needed

2.15 Training

Training The vendor must provide a detailed plan for training FCPL authorized staff. This plan must include the following:

- **A description of the training in all system functions for each of the functional modules.**
- **Specify what training is included with the system purchase and what training would be available at additional cost.**
- **Specify what training is on site and what training is off site.**
- **Specify the type of training (demonstration, hands-on, etc.) that will be used.**
- **Specify the training/experience of the vendor's staff who will be providing the training. Provide names, training experience, job titles, and number of years as a trainer with your company.**
- **Provide a general training calendar relative to system implementation and specify the number of contact hours of training that will be provided for each system component.**

The vendor must also state in detail what training would be available for major system revisions. In describing the training the vendor must clearly state what training is included with the system purchase and what training is available at an additional cost.

DRA Training Overview

DRA has a comprehensive training program designed and taught by librarians and teachers experienced in automation. We tailor each customer's training program according to the software and hardware components purchased by the library. We usually conduct training on-site although there are options available for St. Louis or regionally based training.

The initial training will begin at a time agreed upon by the Frederick County Public Libraries and DRA. All courses are taught in a structured environment using sample exercises and hands-on experience. Because of the hands-on nature of the training, we have found that keeping the class size small (approximately six staff members) provides the best learning experience. Checklists and evaluations are completed near the end of training sessions with enough time remaining to clarify any outstanding points.

On January 1, 2001, the DRA Training Department implemented a guarantee for all DRA training sessions. This training guarantee ensures that our customers receive quality training from qualified trainers, and assures training dollars are well spent.

This guarantee is measured by administering exit assessments at the close of each training session. Participants who score at least 80% on these assessments will have successfully completed the training. Individuals who do not score at least 80% will have the opportunity to retake the same training session, whether through remote training, training at one of DRA's training centers in St. Louis, Montreal, or Monterey, or at the customer site. There will be no cost for the additional training session; however, the customer will be responsible for all travel costs. Any repeat training sessions must be completed within one year of the original date of training.

DRA believes that the best way to build a knowledgeable staff is to develop an in-house training program. The DRA philosophy is to "train the trainer." This means that we will provide documentation, training materials and hands-on practice when the system is installed. The staff members who attend these sessions can then train other staff members as they are hired or for cross-training purposes. To assist with in-house training, we will provide user's guides, quick reference sheets, checklists, worksheets and course outlines. We also provide a database of training files so that the main, live database does not have to be used for training purposes.

DRA Trainers' Experience

Each DRA trainer must undergo rigorous training procedures prior to performing an actual training session. Most of our trainers have a library background and others are degreed teachers. Depending on the type of training that will be performed, a trainer must undergo between three to six months of instruction.

For new installations, training typically takes place in the library. For ongoing or refresher training, DRA has state-of-the-art facilities in St. Louis, Monterey, and Montreal. The facilities at our St. Louis headquarters include several newly renovated classrooms with high-speed network connections and individual PCs. Some DRA customers also work with us to set up regional training, where customer libraries within a given geographical area join together to share training at a centralized location.

Every DRA training session concludes with the distribution of an evaluation form through which the trainees critique both the trainer and the course materials. The training supervisor and the customer service manager review all of these forms to make incremental improvements in future sessions.

Your training and software support will be provided by our Software Trainers.

NANETTE SWARTHOUT, Training Supervisor Ms. Swarthout comes to DRA with more than 10 years classroom training experience, including developing and implementing curriculum. As former director, manager and trainer at Trans World Airlines, Ms. Swarthout managed, developed and implemented accredited training programs in four states. She is a member of the American Society for Training and Development, SHRM-Society of Human Resource Managers and DETC – Distance, Education and Training Counsel. Ms. Swarthout holds a B.S. from Illinois State University and a Master of Business Administration from Fontbonne College.

RACHEL BOWELL, Software Trainer Ms. Bowell comes to DRA with experience working in a variety of library environments, including public, academic and prison libraries. This experience includes time working in both public and technical services. She has held professional library positions in Children's Services, Adult Reference, and Young Adult Services. Her instruction experience ranges from teaching college-level German, tutoring high school and college students, and computer instruction classes and programs for all ages of public library patrons. She holds a B.A. in English Literature and Creative Writing, and an M.L.S. from Indiana University.

MERLYNE HOWELL, Software Trainer Ms. Howell worked as a Monographic Cataloger at Indiana University before joining DRA in July 2000. While pursuing her M.L.S. degree, Ms. Howell also worked as a Reference Assistant in the Indiana University Research Collections. Prior to this, Ms. Howell spent three years in South Korea teaching English and academic writing at Ewha University. Ms. Howell holds a B.A. in International Studies (focus on East Asia) from Earlham College and an M.L.S. from Indiana University.

ERIKA KOHOUTEK, Software Trainer Ms. Kohoutek joined DRA in June 1998 after working five years in an academic library while attending school. After working in the Acquisitions department and the Humanities Reference Desk for three years, Ms. Kohoutek joined the Serials processing team full time. Ms. Kohoutek joined DRA with an understanding of workflow issues within the realm of an academic Technical Services environment. Ms. Kohoutek holds a B.A. in English from Southern Illinois University-Carbondale.

PATRICIA SUESSEN, Software Trainer Ms. Suessen joined DRA in 1999. She previously taught college level courses in the areas of accounting and application-based PC software for over six years. She holds a B.S. in Business Administration with majors in Organizational Behavior and Marketing from Southern Illinois University at Edwardsville. Prior to teaching, she earned a Masters of Business Administration from Southern Illinois University at Edwardsville.

MARIA WETZEL, Software Trainer Ms. Wetzel worked as a Research Librarian in a large law firm, and as an Information Specialist in a corporate library in Cincinnati, Ohio before joining DRA. She holds an M.L.S. from the University of Iowa and an M.A. in English from the University of Missouri at St. Louis.

General Training Calendar

Taos Administration Training
Length of session: 2 days

Taos Administration Training is designed to provide those individuals whose responsibility it will be to load and/or edit the various Taos Systems files, with an understanding of their overall structure, relation and modification.

Upon completion of the Taos Administration training, participants will be able to:

- load the required policy files
- edit and add new privilege files for staff
- interpret the policy text file with the assistance of the Taos Policies Guide
- process requests, and Circulation related notices regarding holds, overdues and fines
- use the Taos Systems Administrator's Guide to locate system operations information
- assign and change passwords (with the appropriate System Administrator privileges)

Taos Basic Operator Training
Length of session: 2 days

This session is designed to give the trainees an in-depth look at the operating system and the software that they are about to begin using. The session covers system problems and errors and the corresponding recovery plans, as well as the basics of system operations which includes:

- Booting the system
- Maintaining user accounts and security records
- Database management
- Logger files
- Reports and notices

Taos Cataloging Training
Length of session: 1.5 days

The Cataloging Training Course is designed to provide participants with a basic understanding of the capabilities of the Cataloging Client software, an overview of navigating the graphical user interface, and the opportunity for hands-on manipulation of the varied types of bibliographic formats that are used in a Technical Services Department during the processing of library materials.

Upon completion of the Taos Cataloging Client training participants will have:

- performed bibliographic, holding, item, authority and patron database searches
- copied a record from an external database source
- utilized workforms to simplify their local cataloging procedures
- added holdings, item and authority records
- transferred holdings and item records
- edited and deleted bibliographic, holding and item records
- utilized features such as *Labeled Display* to facilitate the editing of otherwise difficult to manipulate MARC fields
- customized their own desktop installation of the software by manipulating such features as *Settings* and *Customize* to create a workable and user-friendly environment
- formatted book and spine labels for printing
- understood the operation of the *DRAImport* program
- understood and utilized the multiple formats of online documentation to acquire assistance on various Cataloging Client functions

Taos Circulation Training
Length of session: 1 day

The Taos Circulation Training course is designed to provide participants with a basic understanding of the capabilities of the Circulation Client software, an overview of navigating the graphical user interface, and the opportunity for hands-on manipulation of the various transactional functions that are used at library circulation desk.

Upon completion of the Taos Circulation training participants will have:

- performed searches for patron and item records using the search functions and appropriate search qualifiers
- demonstrated the ability to register a patron from both the *Charge* screen and *Patron Status* screen
- charged, renewed and discharged items for a patron
- demonstrated the ability to change the default due date for items
- utilized the *Request* function from the *Patron Status* screen to place title or item specific requests
- utilized the *Send Item List* to *Route Out* and *Route In* a requested item
- utilized both the *Handle Payment* tab and the *Fees/Fines* feature from the *Patron Status* screen to pay and waive fees and fines
- demonstrated an ability to respond to system messages that indicate that a particular procedure requires the intervention of a staff member with override privileges

Taos Public Access (DRA Web2)
Length of session: 1.5 days

You will be able to conduct both local and remote database searches, single and multiple database searches and merge the result sets, filter search results, access context specific Help information, view patron account information, use hypertext links to access additional information and more.

Additional DRA Web2 training topics include:

- Installation and configuration considerations
- Settings and message files
- Log files relevant to DRA Web2
- Searching, exploring all the Web2 features available
- Web2 features
- Setup considerations, including information on customization
- HTML and Macros section, demonstrating the use of DRA Macros

Taos Serials Training
Length of session: 1 day

The Serials Training Course is designed to provide participants with a basic understanding of the capabilities of the Serials Client software, an overview of navigating the graphical user interface, and the opportunity for hands-on manipulation of the various functions that are used in the library's Serials Department.

Upon completion of the Taos Serials Client training, participants will:

- be able to identify and navigate through the various options of the DRA Serials Client
- understand the various records that comprise the Serials Client and how these records interact with one another for prediction and check-in
- be able to identify, create, maintain and delete Supplier Records, Accounts and Addresses
- understand, add, edit and delete DRA Holdings records
- understand Pattern creation based upon a publication's frequency, publication date and enumeration
- understand, add, edit and delete Copy records
- manipulate Issue records and Summary Holdings to accurately reflect the library's holdings
- be able to check-in predicted issues

Taos Acquisitions Training
Length of session: 2 days

Training includes creating supplier and fund records, placing and receiving purchase orders, selection lists, and reporting functions.

Taos Report Writer
Length of session: 2 days

Report Writer training is designed for staff members who have some familiarity with an editor and basic DRA file structure. DRA recommends that all staff involved in this training attend System Operator training. This section covers basic concepts such as file structure, establishing report writer routines, selecting, reporting, calculating and manipulating data.

DRA Distance (Remote) Training

The DRA Training Department is pleased to offer "Distance (Remote) Training" as a Taos training option. Frederick County Public Libraries may choose among a wide variety of Distance Learning training sessions, all offering DRA's traditional high quality in a "virtual classroom" environment. Distance Training benefits include:

- Comprehensive DRA Training Materials
- Knowledgeable DRA Trainers
- Hands-on training session
- One-on-one assistance and guidance
- Opportunities to ask questions
- Travel costs are limited to library staff (if applicable)

Participation in the DRA virtual classroom requires only a two-way speaker phone and a PC with Internet connection for each participant. There is no DRA software for your site to load.

DRA provides all the necessary training materials. Training session announcements are sent via email by DRA trainers, and guides are provided to introduce and prepare your site(s) for the training sessions.

Distance Training is included at no additional charge for Taos sites, further alleviating a library's budget by eliminating the travel costs associated with training.

DRA On-line Tutorials

In additional to traditional and distance training, DRA provides On-line Tutorials, a training database and related files as a standard part of the system. These files are used throughout the installation phase for onsite training and practice. The training files remain on the system after installation and may be used for ongoing staff training and testing. There is no charge for this training support system.

DRA Users' Group

The DRA Users' Group (www.drausers.org) is an active organization that regularly meets for semi-annual conferences and was formed on June 15, 1984. They publish a newsletter several times during the year. Many regional user groups also exist. We offer training courses at the annual DRA Users' Group Conference in St. Louis in March. DRA offers frequent training sessions at our St. Louis headquarters, which are open to any customer.

Training for Major System Revisions

To date, there have been no major system revisions necessitating special training for DRA customers. However, in the event such a revision would occur, DRA would make every effort to provide the training needed for a smooth transition, at a nominal cost, if any.

Training Costs

All Taos training costs, for both On-site and Distance Training, are itemized in the Cost Proposal accompanying this bid, located in Volume 2, Part 1.

2.16 Test Database

Test Database **FCPL is interested is the use of a test database during the migration and conversion process. This database would contain a small sample of patron, book and other records, and all modules being purchased by FCPL. It would be used by FCPL staff to become familiar with the new system. The vendor must state if they can provide such a database and what if any additional costs are associated with this database. The vendor must also indicate if any additional hardware is necessary, what the hardware requirements are (memory, disk space, etc.) of if the database could be accessed via the Web.**

DRA recommends setting up a complimentary DRAdemo database, accessible through the Internet, allowing Frederick County Public Libraries' staff to become familiar with the Taos system prior to the test migration and actual conversion.

As part of the Taos migration, DRA will create a test database from the FCPL data to be extracted from all library systems. As requested by FCPL, your test database will include samples of patron, book and other records, for all Taos modules purchased by FCPL. There will be no additional charge for this test database, and no additional hardware would be required.

To build the test database, FCPL staff will need to extract data from the library's old system. DRA staff will then convert and load all of the data, using the same procedures and sequence as planned for the live migration. Library staff will continue full use of the old system, without interruption.

The test migration is used to ensure that data is being processed correctly, and that all policies and procedures are working as expected. It is also used to determine, very closely, the amount of time required for completion of the various phases of the migration.

At the completion of this test, FCPL and DRA staff will review the data in the Taos system. Following the successful completion of the test migration, and the review of the data, the test database will be deleted from the server and the live migration will be performed.

Because of the time constraints in performing your libraries' migration to Taos in less than four months, DRA recommends having this test migration performed near the live migration to reduce the total time required for the project. DRA will be happy to work with Frederick County Public Libraries to determine the schedule for data extraction and conversion as part of the implementation schedule.

2.17 Taos Reference List

References **Vendor must submit a reference list of 50 libraries that have a minimum database size of 100,000 titles and currently installed and operating with the proposed system. Public libraries must be clearly identified as public libraries. Reference must include library name and address, name and address of contact person and the size of the system installed (e.g. the number of bibliographic records, the number of patron records).**

The vendor must also submit the names of five references. These references must be library systems, preferably public libraries that are currently using the proposed system. The name of the library, name of a contact person, phone number, email address, date the system was installed, and size of the library's database at the time of installation.

The following libraries are using DRA's Taos library automation system proposed for Frederick County Public Libraries. At this time, we have an additional 13 sites currently going through the Taos migration process, and many more libraries are finalizing their Taos migration plans.

These 50-plus libraries meet the criteria of minimum database size (100,000 titles) and all are currently installed and operating on the Taos system.

Albany Public Library
Ms. Diane White
Acting Director
1390 Waverly Drive, S.E.
Albany, OR 97321
541-917-7589
Email: Dwhite@ci.albany.or.us
135,000 bibliographic records

Two (2) additional library sites:
Downtown Carnegie Library
Lebanon Public Library

Arcadia Public Library
Mr. Kent Ross, Director
20 W. Duarte Road
Arcadia, California 91006
626-821-5568
Email: Kross@ciarcadia.ca.us
118,702 bibliographic records

Ashland Public Library
Ms. Linda Flowers
224 Claremont Avenue
Ashland, OH 44805
419-289-8188 ext. 10
Email: flowerli@oplin.lib.oh.us
109,476 bibliographic records

Bucks County Community Public Libraries (11 Library Sites) and Bucks County Free Libraries (7 Library Sites)

Mr. John Bradley
Library and Instructional Resources
434 Swamp Road
Newtown, Pennsylvania 18940-0999
215-968-8004
Email: bradleyj@bucks.edu
1,105,000 bibliographic records

Chabot-Las Positas College District

Mr. Jim Matthews, Librarian Coordinator
Chabot College Library
25555 Hesperian Blvd.
Hayward, California 94545
510-723-6778
Email: jmatthews@clpccd.cc.ca.us
130,000 bibliographic records

Cherry Creek Schools

Mr. Steve Cowdrey, Director of Technology, Media
Student Achievement Resource Center
14188 Briarwood Avenue, Suite 100
Englewood, Colorado 80112
720-886-7010
Email: scowdrey@ccsd.k12.co.us
350,000 bibliographic records

Chesapeake Public Library System

Ms.Carole King, Acting Director
298 Cedar Road
Chesapeake, Virginia 23322-5598
757-382-6579
Email: Cking@chesapeake.lib.va.us
256,000 bibliographic records
Converted from VTLS 9/00

Six (6) additional library sites:
Central Library
Greenbriar Library
Indian River Library
Major Hillard Library
Russell Memorial Library
South Norfolk Library

East Texas Baptist University
Ms. Cynthia Peterson, Director
Mamye Jarrett Library
1209 North Grove Street
Marshall, Texas 75670
903-935-7963 x321
Email: cpeterson@etbu.edu
256,000 bibliographic records

El Dorado Public Library
Ms. Jeanne Amos, Director
345 Fair Lane
Placerville, California 95667
916-621-5546
Email: lib-pl@eldoradolibrary.org
161,000 bibliographic records

Five (5) additional library sites:
Cameron Park Library
Georgetown Library
Oak Ridge Library
Pollock Pines Library
South Lake Tahoe Library

Eustis Public Library
Mr. E. Steven Benetz, Director of Human Services/Library
120 N. Center Street
Eustis, Florida 32726-3512
352-357-5686
Email: Library@eustis.org
181,000 bibliographic records

Fairbanks North Star Borough Public Library
Mr. Gregg Hill, Library Director
1215 Cowles Street
Fairbanks, Alaska 99701
907-459-1020
Email: library@fnsb.lib.ak.us
186,544 bibliographic records

Two (2) additional library sites:
Noel Wien Branch Library
North Pole Branch Library

Logan Public Library
Mr. Ronald Jenkins, Director
255 N. Main Street
Logan, Utah 84321-3914
435-750-9860
Email: rjenkins@loganutah.org
110,000 bibliographic records

Michigan City Public Library
Mr. Andy Smith, Acting Assistant Director
100 East 4th Street
Michigan City, Indiana 46360
219-873-3056
Email: awsmith@mclib.org
231,000 bibliographic records

National University Library
Ms. Anne Marie Secord, Director of Libraries
9393 Lightwave Ave.
San Diego, California 92123-1447
858-541-7913
Email: asecord@nu.edu
100,000 bibliographic records

Park City Library
Ms. Carol Simmons, Director
1255 Park Avenue
P.O. Box 688
Park City, Utah 84060-0668
435-615-5600
Email: csimmons@parkcity2002.com
276,000 bibliographic records

Additional library sites:
Coalville Depository Library
Kamas Branch Library
Summit County Library

Sladen Library
Ms. Nardina Mein, Director
Henry Ford Health Center
2799 W. Grand Blvd.
Detroit, Michigan 48202
313-916-2502
Email: nmein1@sladen.hfhs.org
210,000 bibliographic records

Southwestern Baptist Theological Seminary
Ms. Amy Adams, Automation Librarian
2001 W. Seminary Drive
Fort Worth, TX 76115
817-923-1921 x2733
Email: Aadams@lib.swbts.edu
157,000 bibliographic records

Torrance Public Library
Mr. Norman Reeder, Library Services Manager
3301 Torrance Blvd.
Torrance, California 90503
310-618-5968
Email: nreeder@library.ci.torrance.ca.us
271,000 bibliographic records

University of California - Los Angeles
Ms. Gloria Werner, University Librarian
Ms. Terry Ryan, Associate University Librarian of Systems
11334 University Research Library
UCLA - 405 Hilgard Avenue
Los Angeles, California 90095-1575
310-825-1203
Email: Tryan@library.ucla.edu
3,400,000 bibliographic records

Virginia Beach Department of Public Libraries
Virginia Beach Public Library
Ms. Martha Sims, Director
Municipal Center - Building 19, 2nd Floor
2416 Courthouse Drive
Virginia Beach, Virginia 23456-9068
757-427-4321
Email: msims@virginia-beach.va.us/dept/library/
300,000 bibliographic records
Converted from VTLS 12/00

Nine (9) Additional Library Sites
Bayside Area Library
Great Neck Area Library
Kempsville Area Library
Municipal Reference Library
Oceanfront Area Library
Pungo Blackwater Area Library
Virginia Beach Central Library
Wahab Public Library
Windsor Woods Area Library

Woodstock Public Library
Mr. Stephen Nelson, Chief Librarian
445 Hunter Street
Woodstock, Ontario N4S 4G7
Canada
519-539-4801
Email: sjnelson@ocl.net
105,000 bibliographic records

Five (5) Taos References

Chesapeake Public Library System
Ms. Carole King, Acting Director
City of Chesapeake
298 Cedar Road
Chesapeake, Virginia 23322-5598
757-382-6579
Fax: 757-382-6260
Email: Cking@cheapeake.lib.va.us

Eustis Public Library
Eustis Memorial Library
Mr. E. Steven Benetz, Director of Human Services/Library
120 N. Center Street
Eustis, Florida 32726-3512
352-357-5686
Fax: 352-357-5450
Email: Library@eustis.org

Michigan City Public Library
Mr. Andy Smith, Acting Assistant Director
100 East 4th Street
Michigan City, Indiana 46360
219-873-3056
Fax: 219-873-3067
Email: awsmith@mclib.org

Torrance Public Library
Mr. Norman Reeder, Library Services Manager
3301 Torrance Blvd.
Torrance, California 90503
310-618-5968
Fax: 310-320-3421
Email: nreeder@library.ci.torrance.ca.us

Virginia Beach Department of Public Libraries
Virginia Beach Public Library
Ms. Martha Sims, Director
Municipal Center - Building 19, 2nd Floor
2416 Courthouse Drive
Virginia Beach, Virginia 23456-9068
757-427-4321
Fax: 757-427-4220
Email: msims@virginia-beach.va.us/dept/library/

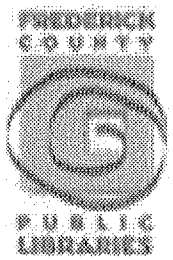
2.18 Subcontractors

Subcontractors **The vendor must name any subcontractors that will be used in any way to fulfill the terms of this contract. The name of the subcontractor, address, nature of the service provided, and experience providing this service for the vendor must be stated by the vendor. In this section the vendor should list any agreements they have with other vendors (e.g. Amazon, Barnes and Noble, etc.) that will impact the installation of this system as a patron views it.**

DRA does not anticipate the use of subcontractors to fulfill the services proposed in this Response. DRA periodically makes business decisions to form alliances with various third-party vendors after careful analysis.

In response to FCPL's specific inquiry about DRA alliances which would impact the Taos system as viewed by patrons, we are pleased to announce that DRA and netLibrary joined forces last year. DRA and netLibrary are working together to assist our library customers in implementing eBook solutions throughout their systems.

netLibrary, described in detail at http://www.netlibrary.com, is a leading provider of electronic books (eBooks). By working side-by-side with DRA and our customers, and by utilizing electronic publishing, netLibrary offers an information and retrieval system for electronically accessing the full text of books. This functionality will provide a seamless integration, allowing libraries to utilize the Taos automation system to acquire, catalog, preview, and circulate eBooks.



Response To

Request For Proposal

RFP #01-77, (#0000000275) Library Automation Software

Frederick County Public Libraries

For An

Integrated Client/Server Library System

Part 3

"Response to Specifications"

July 12, 2001

System Requirements

Any system quoted by a vendor must be an integrated, client/server library automation system that currently supports the following basic functions:

A	Bibliographic and Inventory Control
A	Authority Control
A	Cataloging/Database Management with Z39.50 client functionality
A	Public Access Catalog
A	World Wide Web Catalog Interface
A	Circulation
A	Serials Control
D, 9/01	Acquisitions and Fund Accounting
A	Community Information Database
A	Z39.50 compliancy for the server and all modules
A	Report Generator
A	MARC Bibliographic and Authority Record Import/Export Utility
D, 12/01	Materials Booking
A	User request and information module
A	Information gateway (WWW)

FCPL must be able to license and install all of the above modules or features or install them one at a time. The vendor must also quote and be able to provide all of the following products and services to the full extent required for successful system implementation and operation:

A	Data Conversion
A	Software (both operating and application)
A	Software and Hardware maintenance
A	Installation and database loading
A	Training
A	Documentation
A	Hardware

A. General Requirements

The proposed system must have all of the following capabilities:

_A__1.	Require no additional purchases or local programming in order to become operational.
__A__2.	The system must be designed for optimum operation in a Web-based computing environment.
__A__3.	Use a client/server architecture. All clients must run under Windows 95 or better.
__A__4.	All system components must operate in a real-time interactive mode, providing the ability to create, update, maintain, and access all data for library materials and patrons in real time.
__A__5.	The system must be installed on a platform with sufficient processor, memory and disk storage, which in the library's estimation, ensure adequate response times.
__A__6.	Be fully online and have no dependency on an outside host computer for internal routing operations.
__A__7.	Have the capacity for future expansion to support double the number of simultaneous workstation users through the modular addition of storage devices, memory processing units, and workstations, without replacing any existing hardware and without any decrease in response time.
__A__8.	Provide for the input and output of bibliographic, authority, and patron data. All bibliographic and authority data will be in USMARC format.
__A__9.	Have the demonstrated capability of supporting, with one central computer configuration sharing a common database, Branch libraries each maintaining different delinquency criteria, fine calculation rules, loan period rules, patron databases and hold parameters; each different library's catalog must also be able to be hidden from the users of the other system; the Library must also be able to define an unlimited number of these agency-specific parameters.
__A__10.	Have the ability to concurrently run all application modules on the same hardware configuration without having to logoff and logon across modules and without system shutdown.
__A__11.	All modules must be graphical and accessible from any workstation through a login procedure.
__A__12.	All modules must be licensed for the server not the client.
__A__13.	Proposed system must be fully Z39.50 compliant for client and server and configured for full TCP/IP support. It must also easily interface with external databases such as those found on he Internet using TCPAP and Z39.50 protocol.
__A__14.	The system must be capable of transparent functionality with Ethernet and TCP/IP compatible local area networks. The Vendor must be able to supply a list of at least 50 current library customers with a minimum database size of 100,000 titles that are available for Web-based PAC searching via the Internet.
__A__15.	Fully integrated, using a single common, catalog database for all operations and a common operator interface across all modules.
__A__16.	Hardware resources must be expandable to large networks including RAID, multiple processor computers and multiple servers or must be reducible to as little as a single workstation configuration.
__A__17.	The database engine must support mission critical database management with full auditing and rollback.

A 18.	Protection for application, system and data files through the use of passwords or other security measures must be provided so that information critical functions cannot be performed without proper authorization.
A 19.	The proposed software must include procedures and programs that enable rapid recovery from hardware or software failure.
A 20.	Once configured by the library, built-in security protection for software modules and sub-modules must be invisible to the user; that is, password access must not be necessary at each level of software except when deliberately configured that way by the library.
A 21.	The system must be configurable so that it does not even display on specific workstations the modules and sub-modules to which those stations do not have access.
A 22.	If the system fails to function according to library specifications, the vendor will make necessary modifications, retest and reinstall software in a time period to be specified in the contractual agreement.
A 23.	The system shall protect the central files from erasure or contamination.
A 24.	The system must be able to operate 24 hours a day, 7 days a week, 52 weeks a year. The system must be available for staff and patron use while backup procedures are being performed.
A 25.	The vendor must provide support service 24 hours a day, 7 days a week, 365 days a year. The vendor must provide direct access to its own support staff, and not use third-party staff, third party answering services or voice mail. Library access to vendor support must not be restricted to specific library-authorized staff.
A 26.	Expansion, including additional features, modules, or hardware shall be possible without interruption to the programs already operational.
A 27.	Software upgrades shall be requested by FCPL and supplied to FCPL in a self-installing form, preferably ftp download or an upgrade via a Web site. Instructions for software upgrades must be provided by the vendor before the upgrade is installed.
A 28.	The system must be capable of reading FCPL's existing item and patron barcodes. With the addition of the Detention Center Library the software must also be capable of reading a second type of item and patron barcodes. (see Section K "Barcodes" for more detail)
A 29.	The system must allow for unattended backup onto industry standard magnetic storage media. All backup operations should be completed via a menu-driven interface with no separate programs or knowledge of UNIX or other operating system software procedures required.
A 30.	The system must be UNICODE-compliant and correctly display UNICODE-based fonts in the PAC.
A 31.	A backup system for circulation must be available. All transactions on the backup system must directly feed into the main system and immediately update all files when it is again available.
A 32.	No specialized console printing can be required.
D, 9/0133.	The system must be able to support SIP2-compliant patron self-checkout stations.
A 34.	The system must support workstations designed for patrons with special needs, including blind and hearing-impaired patrons.
A 35.	Using a single type of printer, the system must be capable of producing: cash register-type receipts, statements of checked out items, receipts for checked in books, and copies of any patron account statuses available to an operator at checkout or check-in.
A 36.	Any vendor proposed system must be capable of working with third party software.

B. Client and User Interface Requirements

A 1. Vendor must offer a choice of distinct client software for use in accessing and operating the proposed server modules, including, but not limited to:

- A a character-based client stored on the host computer for use by workstation o web access users, without the need for local client software
- A Windows staff client with a graphical user interface (GUI) designed for use PC's running Microsoft Windows 95 or better.
- A World Wide Web (WWW) client that permits access to all public services offered by the library through standard Web browsers such as Netscape, Internet Explorer, etc.
- A Fully-integrated Z39.50 cataloging client supporting searching and capture o MARC bibliographic and authority records from any Z39.50 compliant server

A 2. Any software proposed by the vendor must allow flexibility when designing screens. FCPL must be able to easily redesign any screen without programmer or vendor intervention.

A 3. The system must enable an authorized library administrator to determine the exact text of help screens user-by-user.

A 4. Help text must be available for each command. The operator must be able to request and receive context-sensitive help for the command in use with a single keystroke.

A 5. An operator must be able to page backwards and forwards through the help text.

A 6. The client must perform all edit checking of user input before sending input to the server.

A 7. The client must control all attached peripherals, including barcode readers and printers.

A 8. The software must accept input from devices such as barcode readers attached to a workstation.

A 9. The initial logon to the system must set all privileges for all modules and must not require operators to change "subsystems" to perform a different set of commands.

A 10. The system's modules must be aware of activities performed by other modules and of the data available to them.

A 11. All commands must be available to an authorized user simultaneously, without the need to switch modules, menus or screens.

A 12. Users must be able to compile and run reports at any time without significant performance degradation, including during backup operations.

A 13. The vendor must provide Web-server access to all service requests placed by a specific customer. The customer may place service requests via e-mail, Web or by telephone.

C. Network/Information Access Requirements

A 1. The system must be configurable to connect to the Internet and to other libraries and services.

A 2. The system must include a PAC module that allows on or off site searching of the PAC with any standard graphical web browser (Netscape, Internet Explorer, etc.).

A 3. The system must provide access to local URLs.

A 4. Through the PAC module (with its Z39.50 client capabilities), a user must be able to search for materials among the collections of other library systems that have Z39.50 server support for their catalogs.

A 5. The web client must be HTML based and may be customized/configured without vendor or programmer intervention or assistance.

A 6. The vendor must provide an interface to the PAC that is WAP/WML enabled.

A 7. The database must be manipulated using standard query language without using proprietary vendor software.

D. Central Processing Unit (if new hardware is recommended)

_A_ 1. The CPU, as well as other proposed equipment must not require any special environment. A normal office environment must suffice. The system's hardware platform must be tolerant of varying environmental conditions including ranges of temperatures (40 to 80 degrees Fahrenheit) and humidity (10 to 90%).

_A_ 2. The CPU must be capable of supporting all functions of the fully integrated system, including expansion to accommodate libraries and modules that are not part of this bid.

_A_ 3. The CPU must include a CPU processor, disk storage (potential capacity of at least 20 GB), appropriate backup device, UPS, power monitoring software, and diagnostic modem. Any other equipment considered necessary by the vendor must be stated separately from the above requirements and an explanation given for its inclusion

_A_ 4. The CPU must provide sufficient storage space for three years of normal growth (5% annually) for the database and modules specified in this document.

_A_ 5. The vendor must provide software that automatically performs an orderly shutdown of the system when power is lost.

_A_ 6. The UPS must provide enough power for several minutes of operation prior to beginning an orderly shutdown of the system. Although specified by the library, the time between power loss and the beginning of shutdown will not exceed 5 minutes.

_A_ 7. The CPU must include an Ethernet port that may be connected to a TCP/IP Local Area Network.

Required Database Features

A. Bibliographic Files

_A_ 1. The system must store MARC bibliographic records of the library's collection, providing efficient, complete access to the collection, and protecting the integrity of the database while providing the flexibility to import and /or export records from/to other databases.

_A_ 2. Cataloging and database editing functions must be configurable so that they are available only from designated staff terminals.

_A_ 3. Pre-formatted screens (templates) should be provided for local MARC data entry and editing. The library must be able to create any number of templates for its own use.

_A_ 4. Automated error checking of local data entries for conformity to US MARC rules should be included as a feature of this module.

_A_ 5. The system must accept MARC records from on-line bibliographic utilities.

_A_ 6. The system must support electronic transfer of individual bibliographic records without changing or deleting fields in the US MARC format.

_A_ 7. The system must detect duplicate records (bibliographic, authority and holdings records) being loaded to it and retain them separately for manual review.

_A_ 8. The system must load full US MARC bibliographic records (virtually without limit to the record length)

_A_ 9. The system must load brief US MARC records.

_A_ 10. The system must provide a method for entering and verifying hypertext links.

_A_ 11. Bibliographic records must be indexed for access from a variety of points, including personal names, corporate names, conference names, titles, parallel titles, uniform titles, variant titles, series titles, subject headings (including cross-references), OCLC numbers, barcode numbers, ISBN/ISSN numbers, LCCN numbers, format and item level call numbers.

B. Database Files

A 1. The system must provide access to and maintenance of bibliographic and authority MARC record formats.
A 2. The system must be able to access multiple cataloging resource databases.
A 3. It must provide for manual keying of new (original) bibliographic and authority records into the database in US MARC format.
A 4. The system's database must be directly accessible to third-party printing and reporting tools such as Microsoft Word and Microsoft Access by using an appropriate ODBC driver or file format.

C. Authority File

A 1. The system must load, maintain and output a database of authority records in full US MARC authority format.
A 2. The Cataloging Module supports the same record creation, modification and deletion capabilities for authority records as for bibliographic records.
A 3. New authority records must automatically create all "see" and "see also" references for bibliographic records containing that authority heading.
A 4. The system must use existing indexed entries from bibliographic records for verification so that MARC authority records are only required for "see" and "see also" references and not for every heading in the bibliographic database.
A 5. The system must provide a method for differentiating between LC and non-LC authorities, and support multiple thesauri based upon the different listings from which authorities come including at least author, title, subject and LCCH.
A 6. The system must provide immediate, real-time indexing of all authority records added to the system.
A 7. The system must verify authority headings against existing bibliographic and authority entries in real time.
A 8. The system must display upon request a list of valid headings from the authority file when the heading keyed does not match an existing heading already in the authority file. Authorized staff must be allowed to correct and/or replace incorrect headings
A 9. All fields in the US MARC authority records, including the fixed and variable fields must be editable either individually or globally.
A 10. The system must automatically generate "see" and "see also" authority references as authority records are edited.
A 11. The system must accommodate authority records whether generated in-house or loaded from external sources including bibliographic utilities, Library of Congress, and others.
A 12. The system must allow records to be selected and reviewed by authority for verification of in-house and external sources.
A 13. Local entry and editing must be provided through formatted screens.
A 14. The system must allow authority files to be printed and/or downloaded in US MARC format.
A 15. The system must be designed to accommodate changes in the US MARC authority format and new national standards formats as they are developed (e.g. new format for LCCNs).
A 16. The system must link each heading in the library's authority files to each occurrence of that heading in the bibliographic file.
A 17. Users must be able to verify headings in a bibliographic record against existing authorized headings
A 18. Bibliographic records must be automatically re-linked to authority records when authorities are merged or changed.
A 19. The system must permit the operator to select a heading from an authority or existing bibliographic record list.

A 20. The system must update all occurrences of a heading in a bibliographic file with a single machine transaction.

A 21. The system must match incoming LC or other national standard authority records against the local file.

A 22. The system should allow authorized headings or entries to be added, changed, or deleted as part of a new bibliographic record and record the source of that authorized heading or entry.

A 23. The system must provide reports that list headings used for the first time, invalid headings that should not have been used (matches "see"), cross references that are blind either because no record exists or because a record has been deleted, duplicate barcodes, and duplicate authority records.

A 24. Authorized records for headings and entries must include the source of auth6rity, the date authorized or first used, the date of last revision, related see," see also," see from," and see also from" references.

A 25. The system must include "earlier/former later," and broader/narrower" search term references that indicate relationships between two headings.

A 26. The system must store and index local subject headings. These headings must be searchable from authorized workstations.

A 27. The system must display references, scope notes, reference notes, and general information notes.

A 28. The authority file must be browsable to view adjacent headings and entries as well as the related entries and notes.

A 29. The system must display, upon request the total number of bibliographic records linked to a specific authority heading and individual bibliographic records linked to a specified authority heading.

A 30. The system must accommodate personal, corporate, and topical name headings in a name authority file, title, uniform title and series entries in a title authority file, and subject headings in a subject authority file.

A 31. The system must allow authorized staff to transfer a keyword, phrase or exact heading from an authority record to a bibliographic record and transfer a keyword or phrase from a bibliographic record to an authority record.

A 32. The system must allow authorized staff to use a keyword or phrase from an authority display in a search without retyping.

A 33. The system must check the operator's input against the appropriate authority entries for fields under authority control.

A 34. The system must enable an authorized operator to retrieve and display records flagged as unauthorized on-line at the workstation and print these records.

A 35. The system must allow an authorized user to modify authority control policies to include additional thesauri after initial installation of the system.

A 36. The system must not impose a limit on the number of "see from" and "see also from" headings that may be added to an authority record.

A 37. The system must be configured to have separate indexes for LC name and subject headings, NLM subjects, or other locally defined indexes.

A 38. The system must be configurable to accommodate a single authority index or the addition of multiple indexes.

A 39. The system must enable authorized staff to change default system values for thesauri at a later date.

A 40. The system must allow correction of incorrect headings by authorized staff.

D. Patron File

__A__ 1. The information entered, stored and/or linked in the patron database must include, but is not limited to the following fields:

- __A__ title
- __A__ name (last, first and middle initial)
- __A__ permanent and secondary address
- __A__ city, state and zip code
- __A__ multiple phone numbers
- __A__ patron type or category
- __A__ date the record was created
- __A__ barcode number
- __A__ manual block field
- __A__ date record was last updated
- __A__ alternate ID number (PIN)
- __A__ issuing Branch library
- __A__ note field or free text field that cannot be viewed by the patron from remote access
- __A__ email address
- __A__ materials outstanding
- __A__ fines and fees owed
- __A__ hold requests
- __A__ date card was last used (last activity)

__A__ 2. Patron information must be indexed by at least patron ID number, patron name, alternate ID number, zip code, and date library card was last used.

__A__ 3. The system must be able to detect duplicate patron records. Duplicate checking must be possible on any library designated indexed field(s) within the patron record.

__A__ 4. The system must allow patron records to be created, modified, copied and deleted by authorized staff.

__A__ 5. Pseudo-patrons such as technical processing, bindery or even another library must be accepted as valid patrons.

__A__ 6. The system must support an unlimited number of patron types (such as patron, staff, in-house, and books by mail).

__A__ 7. The patron ID must be a unique identifying number to preclude duplicate records for the same patron ID.

__A__ 8. The alternate ID (if there is data stored in this field) must also be a unique index, so entering a driver's license number or SSN in this field provides a double protection against duplicate patron records.

__A__ 9. The system must provide coded fields and/or templates to expedite the entry of patron information. Codes entered must be verified against a list of existing codes to insure database integrity.

__A__ 10. The system must allow for printing a specific patron record including all currently checked out items, holds and outstanding fines and fees, etc. This information will print continuously until the end of the information is printed and not one section (items checked out, fines, etc) per page.

__A__ 11. The system must accept patron records in machine-readable form for initial database creation.

__A__ 12. The system must permit the library to define the amount of patron information that can be seen from the main checkout screen and by patrons accessing their record from a PAC or remote login.

A 13. The patron file must be accessible by staff using the patron's surname, barcode or some other alternate identifier.

A 14. The system must allow authorized staff to browse, alphabetically by last name, through the patron database.

A 15. The system must allow staff to assign a new barcode to a patron when the old one is lost without otherwise affecting the existing patron record. The patron information and items charged to the patron from the old barcode must be linked to the new barcode.

A 16. The system shall allow authorized staff to execute global updates to subsets of the patron file, up to the full patron file.

A 17. The system must allow for easy retrieval and editing of a patron record from within the checkout mode.

A 18. Authorized staff must have the ability to delete a password or PIN in order to assist patrons who have forgotten their password or PIN.

A 19. Patrons must have the ability to change their password or PIN from a PAC, remote login or with staff assistance.

A 20. The system must allow the library to purge inactive patrons automatically according to Library-defined parameters (such as, date of last action and/or type of patron).

A 21. Patrons with items checked out, fines or blocks must not be automatically deleted.

A 22. The system must generate a report of patrons who met the deletion requirements but were maintained in the system because of conditions described in the item above.

E. Data Files for NLARC and Item Records

A 1. The system must accommodate a labeled item record to uniquely identify copies or volumes of a specific title.

A 2. This record must contain a unique number corresponding to an optically scannable identifier such as a barcode.

A 3. MARC data may include monographs, government documents, serials, media pieces, or other types of material. Item records must be linked to an item-specific barcode number, fine level, material type, notes, call number (Dewey), series, and loan period.

A 4. Item records must also link to due date (if checked out), the last discharge date, number of circulations since a specified date, and holds against the item.

A 5. In the public access mode, item status must be automatically displayed to the user retrieving the record.

A 6. Holdings records for series and monographic sets must include a summary format as well as volume-specific and copy-specific data.

A 7. The system must automatically link item records to bibliographic records in real time, if appropriate copy information has been placed in specified USMARC fields.

A 8. The system must be compatible with a variety of barcode labels, including 3 of 9, and CODABAR, Code 39 barcode formats.

A 9. This record should contain a barcode, the shelf location, branch location, circulation status, statistical category, loan rule used, material format/ material class, item call number, circulation counter (e.g. total circulation count, circulation since library specified date), renewal counter, last activity date, note fields, last date returned, cost, and space for other library-defined fixed or variable length fields.

A 10. Item records must be variable in length, with a variable number of variable fields, which may be repeatable and allow for a separate call number in each item record. FCPL should also be able to specify additional new variable-length field and their display labels.

A 11. The barcode number and item call number must be indexed for direct retrieval of item records All other fields must be available for reporting purposes.

A 12. The system must provide for coded fields to expedite the entry of item information. Codes entered must be verified against a list of existing codes to ensure database integrity.

A 13. An operator must be able to create a temporary set of item record defaults to apply in batch editing/rapid updating of existing records.

A 14. If a value is undefined in the parameter table for a fixed field, it must not be possible to accept it and store the item record.

A 15. It should be possible to suppress the display of item records in the OPAC.

A 16. The creation of item records for materials on order without assigning a barcode to the item record must be allowed.

A 17. It should be possible for the library to specify up to *500* individual locations.

A 18. The system must support up to a five-character location code with up to 22 characters available for display in the OPAC.

A 19. It must be possible to create, edit and delete item records from a workstation.

A 20. It should be possible to delete multiple items efficiently by either keying line numbers or a range of line numbers, or by scanning barcodes.

A 21. It must be possible to create item records in serials as individual issues are checked in.

A 22. When issues with items are bound in serials, the system must automatically delete the individual item records and create a new item record for the bound volume at the operator's discretion.

A 23. The system must generate on demand a report, by individual library location if desired, that details those bibliographic records that no longer have item records attached.

Functional Specifications

A. Cataloging

The Cataloging module maintains the bibliographic database and authority control files in full MARC format. This module supports the creation, modification and deletion of bibliographic item and authority control records and accommodates indexing rules.

A 1. The system must provide the tools needed to catalog a record quickly and accurately. These tools include:

- A — local access to a large copy cataloging resource pool
- D, 12/01 — global, instantaneous subject and series authority control
- A — immediate record availability from other system modules
- A — full screen editing
- A — ALA/TJS MARC character set forms
- A — cataloging templates for original record entry
- A — customized card and label printing
- A — full cut-and-paste capability in the editor
- A — accommodation of additional library -defined MARC tags

A 2. The system must maintain a bibliographic database in full MARC format. It must also utilize current MARC conventions for all material types, including the integrated MARC format. The proposed system must also support the full MARC standard for record lengths and field lengths: 100,000 characters and 10,000 characters respectively.

A 3. Except as defined by the MARC21 standard, the system must not place any limits on the total size of a MARC record or any given field, the total number of fields stored, or the number of occurrences of any given field. If so, provide a description of any limits.

D, 12/01 4. The system must provide for global field changes to MARC records including specific subdivisions of authorized headings regardless of their position. The global change facility system must also permit the user to make programmed global changes to any field in any other record type on the system, including patrons, items and course records.

A 5. The system must permit the cataloging system to be updated to reflect LC changes in bibliographic formats.

A 6. The system must be able to display all diacritics and special characters that appear in OCLC and LC records.

A 7. The system permits individual cataloging records to be updated.

A 8. The system must notify an operator, online, if a duplicate record is being added. Duplicate checking must be available on all indexed fields. The library must be able to specify the fields upon which duplicate checking will occur.

A 9. The system must accommodate the transfer of copy holdings (all item/volume records attached or selected item/volume records attached) to another bibliographic record by clicking and dragging the information from one record to another. The undesired bibliographic record must also be deleted, if desired, as part of the transfer process.

A 10. Cataloging must import and retain all encoding levels of bibliographic records.

A 11. The system must accommodate batch loading of bibliographic records in the library's database.

A 12. Indexing must be done automatically as records are added to the database.

A 13. Cataloging must offer several views of a single record, including:

A FULL EDITOR: MARC display including all fields, sub-fields, fixed length field elements, indicators, and leader information (with or without fixed labels and/or lengths displaying).

A CARD VIEW" displays the full card set (one at a time) that would result from the record selected.

A 14. This module must provide for entry and indexing of the library's own call numbers.

A 15. All material formats within MARC bibliographic record(s) must be accepted and differentiated.

A 16. During loading, all fields (including fixed fields) and sub-fields must be retained so that records can be exported later in US MARC format without additional editing (fields or tags must not be stripped from MARC records).

A 17. All field and sub-fields must be editable.

A 18. Records must be modifiable without retyping the entire line or data field.

A 19. The system must accept all Roman alphabet characters and all non-Roman languages (if transliterated).

A 20. The system must not permit bibliographic records to be deleted if any other part of the system has activity related to it (e.g. there is a fine due on the item, a hold pending for the item, a copy is on order, etc). A message should alert staff to the reason the record cannot be deleted.

A 21. The system must be able to export all or part of the bibliographic database in full US MARC format without vendor intervention.

A 22. Bar codes should be validated by check-digit and number of digits by the software.

A 23. When supported by the appropriate hardware, the library must be able to generate a magnetic tape copy of its records in US MARC format.

A 24. The system must require appropriate operator authorization to maintain bibliographic and authority records.

A 25. The system must permit records in the database to be added, edited, copied and deleted.

A 26. The system must accept records from multiple MARC-based sources including OCLC, file supplied by vendors, such as Brodart, Z39.50 transfer of records, and CD-ROM products such as Bibliofile and Book in Print Plus.

A 27. The system must provide at least 100 MARC-defined work screens which may be modified and allow for the reuse of default bibliographic data.

A 28. In the Cataloging module, bibliographic records must be accessible by any and all of the search indexes available in the PAC. These records must also be accessible by other library defined access points that might not be available in the PAC such as ISBN, OCLC number, or local system control number. Such access must be available from a single prompt.

A 29. The system must allow for a single standard number index that includes, but is not limited to, MARC fields 010, 020, 022, 024, 028, 037.

D, 12/01 30. The system must allow for global changes to bibliographic or item records that do not necessarily involve headings in authority records.

A 31. The system must allow for the creation of work files through the use of a report generator or Boolean search capacity. The resulting file can:

- A — Be brought into the cataloging module for easy record updating.
- A — Be used with a rapid or batch update capability.
- D, 12/01 — Be used with a global change capability.
- A — Be used with a purge capability.
- A — Be used at any time in the future as a live file of editable records, reflecting the current information as retained by the system at the time of use.

A 32. The system must support multiple mapping tables for importing MARC records.

A 33. The system must be capable of outputting all, or any library-defined subset of, bibliographic records in MARC format. This report must be sortable by library defined fields.

A 34. When importing records via online or batch interface, the system must store and display only those MARC fields that contain data.

A 35. The system must allow for the "cloning" (copying) of existing bibliographic records for easy creation of new bibliographic records.

A 36. FCPL must be able to define the display order and field tags for brief and full bibliographic display.

A 37. It shall be possible to replace records that are incomplete with full MARC records using an overlay procedure without costing copy specific information. It should be possible to suppress the display of bibliographic records in the OPAC.

A 38. The system must have the ability to copy and paste MARC fields, as well as drag and drop them, from one bibliographic record to another.

A 39. The system must be capable of creating a report of bibliographic records, based on operator defined search criteria and sorted by location and/or call number in the item record.

A 40. The system must collect cataloging statistics and generate detailed reports both online and in hard copy on demand. Time periods for these reports must be Library-defined.

A 41. The system must generate on demand a variety of lists, including: LC authorities, non-LC authorities, bibliographic and authority records added to the system during a specified time period.

A 42. The system must generate statistics on records added with breakdowns such as format, language, date cataloged, etc.

A 43. The system must provide a full screen editor for cataloging which allows movement across fields with cursor arrows, block and paste, block and delete, field delete, field undelete, word wrap, and field restore which returns a field to its condition prior to any editing in that session.

A 44. The full screen editor must expand the 008 and the 007 fields so that its constituent parts can be edited individually and the field then reassembled automatically.

A 45. The system must provide context-sensitive help related to MARC tag information, and also be able to validate automatically the MARC record, or any part thereof, for MARC encoding errors.

_A_ 46. The system must support a master bibliographic record containing all call numbers, notes subject headings, etc. that may be required by different locations.

_A_ 47. The system must enable barcode readers attached to workstations to b used to input data, such as item labels, into bibliographic records.

A1. Copy Cataloging

_A_ 1. In addition to any MARC record loading utilities and interfaces to bibliographic utilities, the system must use the Z39.50 client for Windows to capture MARC bibliographic records and authority records and import them from OCLC and other Z39.50 compliant databases into the catalog editor ready for modification.

_A_ 2. The system's Z39.50 client must be fully integrated with cataloging and authority control.

_A_ 3. The system must with one keystroke be able to capture a MARC bibliographic or authority record from any Z39.50 version 2 or 3 server, and without any staff intervention or batch processing do the following:

- _A_ match imported records against existing catalog records based on library specified
- _A_ match keys
- _A_ notify the operator of any duplicates
- _A_ assign the call number to the incoming record
- _A_ allow the operator to replace a matching record with the imported record
- _A_ replace an on-order record with a full catalog record, without first requiring the library to assign a common match key to each record
- _A_ index the full text of the bibliographic record for keyword searching
- _A_ place the captured authority records editor ready for staff manipulation
- _A_ assign the format based on fixed field encoding.

_A_ 4. The system must log to a printer all OCLC exports indicating whether the export overlaid or created a new record on the library's system.

_A_ 5. Record overlay must not affect library-defined local fields.

_A_ 6. The system must enable the operator to:

- _A_ save records to the review file one at a time, or in stated ranges
- _A_ view records stored in a review file using proposer's client software
- _A_ remove individual records from the review file
- _A_ duplicate records in the review file
- _____ print records in the review file.

_A_ 7. The system must run all imported records from OCLC against the authority files and generate a daily report of headings to be checked.

B. MARC Holdings Records

__A__1. The system must support the US MARC Format for Holdings.

__A__2. The system must maintain the US MARC Holdings Records on a separate screen, fully integrated with the MARC descriptive catalog record.

__A__3. The system must display consolidated holdings based on the ANSI Z39.44 Serial Holdings Display format.

__A__4. The system must display the full US MARC Holdings Record for staff displays.

__A__5. The system must provide a full-record editor for manipulating, adding, editing and inserting any data, including fixed field information, within the US MARC Holdings Record.

__A__6. The system must provide labeled forms for manual creation of US MARC Holdings Records.

__A__7. The system must allow a US MARC Holdings Record to be associated with any descriptive catalog record stored in the system:

__A__ MARC (monographs)
__A__ Serials
_____ Other_____

__A__8. For US MARC Holdings Records associated with serials, the proposer's predictive check-in system must automatically generate the US MARC Holdings Record.

__A__9. The system must allow multiple US MARC Holdings Records to be associated, and seamlessly linked, to a single MARC descriptive catalog record.

__A__11. The predictive check-in system in the serials module must automatically generate separate US MARC Holdings Records for each location within each library, and associate separate libraries and accompanying US MARC Holdings Records with a single MARC descriptive catalog record.

__A__12. The system proposed must allow searches within the PAC to be limited to the holdings of a single library.

__A__13. The system proposed must be capable of importing existing US MARC Holdings Records from external sources.

__A__14. The system proposed must be capable of exporting US MARC Holdings Records from the system in full US MARC format.

__A__15. The system must enable an authorized operator to select records for export.

__A__16. Import and export of all US MARC data maintained by the system must be possible without vendor intervention, or additional cost.

__A__17. The proposed system must include a Z39.50 version 3 compliant catalog without additional charge.

C. Circulation Control

The Circulation Control module enables FCPL to track the circulation and availability of items within the system and to monitor patron delinquencies.

_A_ 1. This module must be fully integrated with other system modules and features.

_A_ 2. This system should interface with self-checkout systems and automated telephone renewal systems.

_A_ 3. It must use the database maintained by the Cataloging module, so whenever a record is add or edited in Cataloging, it is immediately available to the Circulation module.

_A_ 4. Patron information and on-the-fly" item entries can be entered directly through the Circulation module.

_A_ 5. The system must support separate circulation privileges by location and patron type.

_A_ 6. The system must feature a single keystroke or mouse click for renewal of materials.

_A_ 7. Check-in and checkout must feature a batch mode for multiple items.

_A_ 8. The system must have independent fine rates and notice production by location and patron type.

_A_ 9. Every patron's record must have a unique ID number that can be in the form of a barcode.

_A_ 10. Circulation must provide for checking inventory status of items which are supposed to be on the shelf, quick access to title/item information for editing the record, and support for managing Hold materials.

_A_ 11. The system must support a status of "claims returned" and " claims never checked out." These statuses must be recorded in the patron record. Information in the patron record should include a simple counter field for number of times claims returned have been made.

_A_ 12. During the claims returned process, the system shall automatically update the Note field, without the operator having to input the following information manually: the date of the claim, the item number.

_A_ 13. The system must contain a system of library-defined statuses that can be changed by any authorized operator without programmer or vendor intervention. There must be an unlimited number of statuses allowed.

B1. Circulation Control Parameters

_A_ 1 The system must permit circulation parameters to be library or Branch specific, library item type specific and/or library patron type specific.

_A_ 2. An unlimited number of patron types, item types, fine/fee types, locations, collection groups, and other codes must be supported without vendor intervention. A difference in any one of these elements can result in an entirely different type of circulation load being invoked.

_A_ 3. The system must be flexible so FCPL staff can modify the information that controls due dates, grace periods, renewal and holding capabilities, fines, overdue schedules and content of overdue notices, replacement and processing costs, and fine increment information.

_A_ 4. Loan rules shall provide options/control for:

- _A_ daily loan periods
- _A_ hourly loan periods with overnight/no overnight privileges and rounded to the hour
- _A_ number of possible renewals
- _A_ length of renewals
- _A_ hold status
- _A_ number and timing of overdue notices sent
- _A_ text of each overdue, hold availability, and billing notice
- _A_ grace period for fines
- _A_ fine rates and time lengths (minimum must be 3 different rates and time periods)
- _A_ default item replacement cost to be used when an item cost is not specified in the item record

__A__ processing fee
__A__ billing fee
__A__ text of message for adjustments (e.g. patron receives message with adjusted fine after return of lost book).

__A__ 5. FCPL must be able to specify which kinds of materials (and how many of each) may be borrowed by which kind of patron.
__A__ 6. Loan periods must be configurable for all combinations of item and patron types.
__A__ 7. Fines and fees must be definable by FCPL, can be changed at any time and must include charges for photocopies, database searches, interlibrary loan fees, etc.
__A__ 8. Loan periods and due dates must be calculated according to the type of borrower, type of material and library service hours allowing for holidays and hours library is closed.
__A__ 9. The system must permit the parameters to be deleted, overwritten or copied by an authorized staff without programmer or vendor intervention.
__A__ 10. The system must verify the patron and item record data against all tables as the records are created.
__A__ 11. The system must allow for wildcard operators within each parameter to be used for groups of item types, patron types, or locations that utilize the same loan rules.
__A__ 12. The system must include clear audible and visual signals that barcode labels have been read and the information accepted.

B2. Checkout Procedures

__A__ 1. The system must calculate and display the new due date when items are renewed.
__A__ 2. Loan periods ranging from hours to years must be allowed.
__A__ 3. The system must permit the entry of the borrower and item identification, using a barcode scanner or keyboard.
__A__ 4. The system must permit a check digit calculation to assure that the numbers have been accurately entered. The system must alert the operator visually and audibly when the barcode label is incomplete or incorrect.
__A__ 5. Authorized staff must be able to access a patron's record by barcode entry, partial or full name search, or any other library-defined/system indexed access point.
__A__ 6. The system must allow for searching of patron files or the bibliographic database without exiting the checkout function or interruption of the checkout process.
__A__ 7. The system must permit the creation of a temporary "on the fly" record for items and permits circulation of materials which are not yet in the database.
__A__ 9. The system must display on the checkout screen: patron name, patron barcode, item barcode, and due date.
__A__ 10. Outstanding blocks with an explanatory message will automatically displayed when the patron record is accessed during checkout.
__A__ 11. Automatic patron blocks must be possible for the following:
__A__ too much money owed
__A__ too many items checked out. The system must be able to distinguish different thresholds for different item types.
__A__ library card has expired
__A__ excessive overdues as defined by the Library
__A__ 12. FCPL must be able to manually block any patron for library specified reasons via a single character code in the patron record. This code must be completely defined by the library with no intervention from programmers or the vendor.

A 13. The operator must have the option of printing a due date slip for the patron, from a receipt printer attached to the circulation workstation, which identifies the titles that have been checked out. The slip must include at least the following information: a heading with the library name and phone number, barcode of the item, short title of the item, patrons name or number and due date.

A 14. The system must provide the option of printing a single slip for each title or one slip that includes a list of each title checked out.

A 15. The system must transfer materials to special borrowers or other locations without counting these charges in the circulation statistics.

A 16. The system must check out multiple items with various due dates after entering a single patron identifier.

A 17. The system must list outstanding holds for a patron on demand.

A 18. The system must alert the operator if a patron barcode is entered when an item barcode is expected and vice versa.

A 19. The system must detect items that have not been checked in and audibly and visually alert the operator allowing for a check-in/checkout function.

A 20. From a standard checkout screen, with only one or two simple keystrokes/mouse clicks, the system must allow an authorized operator to:

- A renew items
- A search patron records
- A update/edit patron records
- A collect fines, either in full or any form of partial payment
- A place a hold
- A display a patron's fine account, fine history, claims returned history, hold list, overdue list, currently checked out list, interlibrary loans list
- A search the patron file by any index point

A 21. The overdue list available to the operator at checkout must include a running total of accruing fines as of that minute.

A 22. The display of blocks and other patron transaction history shall be sortable by column (i.e. by due date, transaction location, transaction type).

A 23. The system must allow transfer between functions (checkout, renewal, fine listing/paying, overdue lists/accruing fines, holds/place a hold, edit patron record) without severing the patron link.

A 24. The system must permit the checkout of items with library-defined statuses (e.g. in circulation, lost, missing, etc.) without interruption.

A 25. The system must permit operator entered alternate due date to remain valid for the duration of the patron's transaction. The system automatically reverts to the default due date when a new patron barcode is scanned.

A 26. With only 1 or 2 keystrokes/mouse clicks, the system must allow an authorized operator to merge two patron records into a single account (a source record and a destination record). When performing this operation, the system shall merge all fines, overdues, holds, and related patron history into a single account. The system shall automatically update the notes field to indicate the source record and when the merge transaction occurred.

A 27. The system must automatically visually and audibly alert the operator in the event of a patron or item block. Such block must require operator acknowledgment before checkout can proceed.

A 28. All blocks must have the option to be overridden by an authorized operator. Overrides must be recorded in a special file for later review. Information in this file must include date, time, location, initials of the overriding staff member and patron name and number.

A 29. The system must automatically block the circulation of items that point to a non-circulating loan rule or which have a status of "In Library Use Only."

A 30. The system must check to see if an item is being held, blocking the checkout to all but the requesting patron if an item is in the hold file. The system must allow an authorized operator to override the block and checkout the item without altering the hold queue (patron for whom the item was trapped remains at the top of the hold list). Authorized staff must also be able to override this block, checkout the item and alter the hold queue (patron for whom the item was trapped is deleted from the hold list).

A 31. The system must support self-checkout.

A 32. There must be a batch checkout and check-in mode that does not stop for each fine transaction during check -in.

A 33. A method of auditing fee collection activities must be included in the software.

A 34. New patrons must be able to charge materials immediately upon receipt of their library cards.

A 35. An audible and/or visual signal must occur if a borrower is not registered or if a card's privileges have been revoked or blocked.

A 36. Circulation must automatically block checkout of materials to borrowers who have a library-specified number of items overdue, a specified number of items already checked out or who have unpaid fines/fees over a specified amount.

B3. Renewals

A 1. The system must allow renewals to be performed from a checkout screen without moving to a renewal screen. The same controls as exist for checkout must apply to renewals.

A 2. The system must display onscreen the original date of checkout, the item's location code, a brief title and the item barcode.

A 3. The system must allow the operator to renew all items or a specified list of items, including gaps such as items "1, 3-5," etc. The user must be able to select these items by pointing and clicking on them.

A 4. The system must allow for renewals without either the patron or item being present.

A 5. The system must allow for renewals by scanning item barcodes randomly. The system shall not require the operator to determine in advance the identity of the original borrower before proceeding with the renewal transaction. The system must then determine on an item-by item basis, the patron possessing the material and whether to permit that renewal, based upon all standard, library-defined rules.

A 6. The system must block item renewal if the patron is delinquent, the title has a hold registered against it, the renewal limit has been reached, or an item is restricted in some other way.

A 7. The system must check borrower and item records for any exceptions during renewal.

A 8. The system must automatically calculate a new due date based on library set parameters for renewals.

A 9. The system must allow the renewal of overdue items without leaving the renewal function, but any fines due must be added to the patrons record.

A 10. The system must allow the operator to change manually the due date of renewed items.

A 11. The system must permit automatic online renewals by patrons from a PAC or by remote login.

A 12. The system must be compatible with automatic online telephone renewal systems.

A 13. The system must audibly and visually alert the operator of a patron or item block. The operator must acknowledge the block before the renewal can proceed.

A 14. All blocks must have the option to be overridden by an authorized operator.

A 15. The system must allow the Library to restrict the number of renewals that can be made by a patron according to patron or item type or the item's location.

A 16. The system must audibly and visually alert an operator when the item a patron is attempting to renew is checked out to a different patron.

B4. Check-in

A 1. The system must alert the operator audibly and visually when items checked in have one of the following statuses and require operator acknowledgment before proceeding with the check-in:

- A on hold
- A needs full cataloging
- A lost item
- A missing item
- A not returned to correct location
- A other library defined message
- A belongs to another location

A 2. The system must provide the operator the option of initiating a transaction print as a receipt for the patron.

A 3. The system must allow for a book drop type check-in that allows an authorized operator to set the date and time of check-in. In this situation, barcodes are scanned in bulk. The only screen display or audible signal is for returned materials with a hold, special note(s), owned by another location or needing full cataloging.

A 4. During check-in operations, the system must accommodate transactions such as "claims returned" or "claims never had," missing," and a variety of other missing status codes, and provide reports of items so identified.

A 5. The system must alert the operator audibly and visually with an explanatory message if the item being checked in belongs to another location. Options should include: check-in the item, don't check-in the item, check-in the item and set the status to In Transit, and don't check-in the item and set the status to In Transit.

B5. Circulation Control - Fines

A 1. The system must allow the Library to set independent parameters for fines, notice production, etc. Rates may vary according to location, item type, patron type or a combination thereof.

A 2. The system must allow an authorized operator to attach a special block or fee to a patron record for any reason. A free form text message may be associated with the block.

A 3. The system must clear patron records of fines by at least the following parameters. Cleared records may be purged.

- A charges incurred before a certain date
- A specific types of charges only
- A specific item locations only
- A patrons of a certain type
- A patrons in a library-specified file

A 4. Once patron fine records are cleared, such charges may be purged at the library's discretion.

A 5. The system must calculate and display fines at the time of check-in or renewal. Full or partial payment must be accepted at check-in or checkout.

A 6. The system must print receipts for fines paid showing date, time, amount, and items for which money was received and patrons name or barcode number

A 7. All patron accounting transactions must be date stamped.

A 8. The system must permit an authorized staff to waive or modify system assigned charges.

A 9. The system must permit an authorized staff to access online the patron's fine and payment record, itemizing the details of each item. Detail should include at a minimum: invoice number, type of charge/description, amount due, amount paid, and date of activity. In addition to the above, overdue charges should include the call number, author, title, barcode, date checked out, date checked in, date returned. Any and all exceptions should be described.

A 10. The system must maintain a daily record of fines or fees levied, fines or fees waived, fines or fees collected by agency and by collectors, and be capable of providing a cash box total by workstation for the purposes of balancing with a money drawer. Staff must be able to print this information.

A 11. The system must have the option, on a transaction basis, to check in materials without assessing a fine.

A 12. When displaying fine accounts on the screen, the display must be storable by any column on the page, including date, location, fine amount, and transaction type.

A 13. A patron's total fines and/or fees due must be accessible without paging through the fine payment history.

A 14. An authorized staff member must be able to view an individual fine in a patron record. The display should include, but not be limited to

- A item barcode
- A title
- A check out date
- A check in date
- A fine amount
- A data related to partial payment

A 15. The system must have the ability to keep a history of a patron's fine payments that includes the amounts charged, amounts paid and dates. This fine payment history must be stored for a Library specified period of time and authorized staff member must have the ability to print this fine/payment history.

A 16. A patron's fine balance when viewed from a PAC or from remote login must reflect the current balance due.

B5. Circulation Control - Notices

A 1. Notices generated by the system must include overdues, fines, bills, final bill (replacement) notices, recall, hold availability and hold cancellation, statement of charges, and statement of checked out items that are not necessarily overdue.

A 2. The system must allow an authorized user to produce notices from any workstation. These notices once ordered, shall be automatically produced by the system.

A 3. The automatic production shall include the patron-chosen notification format, whether paper, telephone message or e-mail.

A 4. The system must allow an individual branch library to elect whether or not to send fine notices.

A 5. The system must generate automatically on demand a final notice incorporating the replacement price of the item.

A 6. All notices must include the call number, item barcode, title and author from the appropriate item record and the patron's name or barcode number.

A 7. FCPL must be able to specify the sizes and formats available for notices.

A 8. The system must allow FCPL to determine the message text of all notices and to modify them at anytime without vendor or programmer intervention.

A 9. The system must permit multiple items (no less than eight on a single 8.5 by 11 sheet) to be included on a single notice.

A 10. The patron's record must store the amount and type of notices that have been sent to that patron.

B6. Circulation Control - Lost Books

A 1 The system must allow an authorized operator to change the status of an item from checked out" to "claims returned", missing" or lost".

A 2. If an item with the status of "claims returned" or missing" or lost" is returned, the system shall allow the library to define whether or not a fine will be generated.

A 3. When a status is set to "lost," the system must allow an operator to elect whether or not to generate a bill.

A 4. The system must permit an operator to remove any and all statuses from the item record.

B7. Circulation Control Holds

A 1. The system must allow holds to be placed by title such that the first available copy will fill the request and by item such that only designated copy will fill the request.

A 2. The system must allow holds to be placed on items with a status of on order". These items must automatically be flagged when they are through being processed, alerting staff of the existing hold.

A 3. The system must prevent a patron from placing a hold if the patron has any blocks. An authorized operator must be able to override this feature.

A 4. Staff, patrons at a PAC station, or remote patrons must be able to place a hold request for a title.

A 5. The system will only allow hold requests to be placed for items that are in the circulating collection.

A 6. A hold placed from any workstation, PAC or remotely must be immediately reflected in all system modules.

A 7. An unlimited number of hold requests must be maintained for a single title or item.

A 8. The holds queue must be displayable and printable for a title or item upon request from any staff workstation.

A 9.	Patrons must be able to specify a date after which a hold should be cancelled.
A 10.	The system must support copy specific holds or allow selection by location and media type.
A 11.	The system must provide on demand a printed list of all titles on hold, with the number of holds for each item and title.
A 12.	The system must alert staff that items are currently on the shelf or have been checked-in when holds are placed on those items.
A 13.	The system must automatically cancel holds after the hold's expiration date has passed. This cancellation must not be dependent on running a special job or program to cancel the hold.
A 14.	The system must also allow holds to be canceled manually by staff or by the requesting patron from a PAC station or remote logon.
A 15.	The system must block a patron from placing multiple holds on a single item and title. Authorized staff must be able to override this block.
A 16.	The system must allow the Library to set a threshold for the number of holds that a patron may have.
A 17.	The system must allow for holds to be placed on items that are not checked out, but held at another Branch or location.
A 18.	The system must allow for specifying any material format as not available for hold.
A 19.	The system must not permit a patron to insert a recall command when placing her/his own requests.
A 20.	An authorized operator should easily manipulate the hold queue. The system shall require no more than two keystrokes or mouse clicks to move a patron to another position. However, once the next patron in a hold queue has been notified of the availability of the item, that patron cannot be removed from the head of the hold queue.
A 21.	The system must support patron-elected, automated, telephone, and e-mail notification systems for hold pickup notices.
A 22.	FCPL must be able to set and change the automatic expiration date calculation for holds without vendor intervention.
A 23.	The system must provide statistical records of holds placed, filled, not picked up, and not filled.
A 24.	The system must audibly alert the operator when materials on hold are renewed or checked in. The renewal must then be blocked if holds are found. When this occurs the system must display, on the screen, the name of the patron placing the hold, the title of the item, the barcode number and the location of pickup. A notice should also be automatically be placed in the print queue to send to the patron.
A 25.	At the point of check-in the system should allow a slip to be printed with the name of the patron the item is on hold for so that the slip can be placed in the book on the hold shelf.
A 26.	The system must permit authorized staff to view online the patron record for whom a particular item is being held.
A 27.	The system must produce notices, printed and e-mail, alerting patrons of held materials, including the pick-up location, the title of the item and the last date the material(s) will be held.
A 28.	The system must monitor the length of time items sit on the hold shelf. If the time exceeds the number of days defined to hold, the hold must be canceled and at the library option, an appropriate notice sent to the patron. If there are other patrons in the hold queue, the system shall alert the operator in the identical manner as any other trapped hold.
A 29.	The system must generate a "purchase alert" when the ratio of holds to the number of available copies and/or the number on order exceeds a Library-set threshold.
A 30.	Holds must allow for pickup at either main or Branch libraries, and alert operator to the pickup location.

_A_ 31. The system must allow holds to be placed by title such that the first available copy at any location will fill the request.

D. Public Access Catalog

The Public Access Catalog (PAC) module enables staff and patrons to access the bibliographic files of the Integrated Library System according to library specified parameters, via all system workstations, PACS and remote Web access.

_A_ 1. The PAC module must be fully integrated with all other system modules and include the following:

- _A_ full cross-referencing
- _A_ graphical interfaces
- _A_ various search modes, from easy to advanced
- _A_ complete or partial word searches
- _A_ keyword searches (with Boolean logic operators)
- _A_ subject searches (with Boolean logic operators)
- _A_ search delimiters - publication date range, material format, etc.
- _A_ Internet access supported
- _A_ bibliographies

_A_ 2. The system must provide full indexing for the PAC; i.e., all words in all fields of the bibliographic record must be keyword indexed.

_A_ 3. The PAC must be Web-based and require only a standard Web browser (e.g. Netscape or Internet Explorer). The Web catalog shall not require a vendor-supplied specialized browser or client, either for the adult or children's catalog.

_A_ 4. All bibliographic fields must be full text searchable; i.e., every word of the searchable fields must be indexed, allowing the user to choose keyword and/or phrase searching as appropriate.

_A_ 5. All PAC displays including summary screens and bibliographic displays must be designed to be easily understood by users. Display contents must be modifiable by the library and easily changed without vendor intervention.

_A_ 6. PAC users must be able to place holds and specify the location for material pickup.

_A_ 7. FCPL must be able to block specific items from PAC searches.

_A_ 8. PAC users must be able to build and sort a bibliography on the system and then save it by printing, downloading it to disk or emailing.

_A_ 9. The PAC must automatically return to a "start screen" after a Library determined period of inactivity.

_A_ 10. When the system detects more than one record that matches the search criteria, it must display a count of all the matches and a screen list of titles from which to choose.

_A_ 11. Patrons must be able to view their own record, place a hold or renew items already checked out from any PAC workstation or when using the PAC remotely.

_A_ 12. Actual wording of item status display should be modifiable by the library and (at the library's discretion) items with selected statuses, such as long overdue, lost or missing, should be configurable not to display at all.

_A_ 13. Special versions of the PAC and help screens (children's, large print, etc.) should be configurable by the library.

_A_ 14. Special interfaces, such as talking terminal or TTY interface must be available.

_A_ 15. The PAC Web screen shall allow the library to define and insert automatic links to other library-selected content-provider pages, e.g. lists of book reviews, retail trade information, and book jacket illustration, etc.

_A_ 16. The system must be Unicode-complaint and correctly display Unicode-base fonts in the PAC.

_A_ 17. The PAC shall offer a minimum of 2 formats: public view and staff view. In the staff view, the system shall provide information about the bibliographic record as is available in the

cataloging module including, but not limited to record number, creation date, revision counts, date of last modification, and record location code.

A 18. The PAC must be integrated with other subsystems (e.g. circulation, cataloging, etc.), i.e. the item display must include the circulation status, or order status, as appropriate.

A 19. The system must allow FCPL to define menus, summary screens and bibliographic and item record displays.

A 20. The system must allow the patron, through simple search queries, to determine whether items are owned, where they are located and whether or not they are available with the item's current status shown in real time. File reorganizations or overnight or other kinds of batch processing that are required for the system to reflect a change in an item's status are not desired and should be described in full.

A 21. PAC workstations must be restricted to "read only" in catalog holdings, status, and patron information.

A 22. The system must not use special labeled keys, derived search keys, or function keys as the sole method for searching.

A 23. The system must allow the patron the ability to jump backward and forward to any prior point in a search path without having to retrace the entire search.

A 24. The system must allow the patron to move from one bibliographic description to the next without having to return to a browse list to select the next title.

A 25. The system must automatically retrieve variant spellings (e.g., labor and labour).

A 26. The system must offer the user the option of turning a title or subject "browse" search into a keyword search without requiring the user to re-key the search terms.

A 27. Numbers in titles must display in correct numeric sequence as integers, rather than by ASCII sorting rules.

A 28. The cataloger must be able to program a new item delay, so that there will be time to shelve the item before it shows up in a PAC search.

A 29. PAC workstations must be configurable to prevent the user from exiting the PAC software by entering a library specified password.

A 30. The searched item must be highlighted in the retrieved records.

A 31. The user must be able to initiate a new search from any screen or click on the New Search "button" on the screen.

A 32. Users must be able to initiate new searches from a record on the screen by "lateral searching" or choosing the search terms from a record on the screen.

A 33. The system must include a library-defined list of stop words that will not be accepted as search terms. This list will be transparent to the user, and the system must prompt the user with appropriate suggestions when the user attempts to search with stop words.

A 34. The system must enhance searches by providing "see" and "see also" or "broader: and "narrower" references when appropriate.

A 35. The system must automatically adjust user's keyword searches when no records are retrieved in an attempt to provide a system response beyond a null set, re-executing the search by inserting a Boolean "AND" or "OW' between the terms, executing a truncated wild card search beginning with the first two letters of the first keyword and/or executing a truncated wild card search beginning with the first letter, plus "a" of the first keyword, proceeding through the alphabet until a hit is retrieved.

A 36. If no matches are found, the system must in addition to displaying a browse list, also retain on the screen the term or terms used in a search until the user enters another search term (allowing errors in input).

A 37. From the full record display, with a single mouse click, the system must have the ability to display books shelved next to the selected record in true shelf list order with an option to browse backwards and forwards through the index.

A 38. For each pre-defined location, the system must display holdings for a defined location first in an item -level browse list. Optionally, the system must provide the ability to display only th4 holdings for a defined location and no others unless the patron requests other holdings information.

A 39. Function logic and selection logic options must be consistent on all screens.

A 40. The system provides for library-defined mapping of MARC records to the PAC display, with full selection of the screen labels, as well as which MARC fields shall be included in each library defined label and index.

A 41. The system allows for definition of PAC display constants based on MARC tags and indicators.

A 42. All searches done by users must be logged automatically by the system, and the system must prepare reports that analyze these searches by location, by type, by time, by popularity of terms used, and produce a list of all searches that do not retrieve specific records matching what the user keyed. These reports must be available on demand in text and graph formats, and be printed or displayed to a workstation.

A 43. All records must be indexed and available in the PAC when added to the system in cataloging, from a bibliographic utility, or via a Z39.50-based transfer. All indexing shall be completed via online/real-time processing.

A 44. The system must allow the library to specify any MARC field or any identifiable portion thereof for inclusion/exclusion into any index to the database.

A 45. The subject index must index each subject subdivision individually (e.g., a search of "France" will retrieve all subject headings that include the term "France" regardless of its location in the complete subject term.)

A 46. The system should index a term regardless of how many times it occurs in the system including the keyword index. Any limitations on indexing terms based on their frequency should be described in full.

A 47. The system must have the option for workstations in branch or the Headquarters Library to display branch or Headquarters holdings first or only those holdings.

C1. PAC - SEARCHING

A 1. Patrons must be able to limit a search, either initially or secondarily, by year of publication (range of dates), publisher, language, item type, item category (e.g. mystery, fiction, nonfiction etc.), publication format, adult or juvenile, or location.

A 2. The PAC must support keyword searching of all title, name, subject, notes and selected number fields (individually, in combination, and/or across all fields) in the bibliographic record.

A 3. The PAC must display the number of occurrences of a keyword in the database.

A 4. Staff and patrons must have the ability to specify the fields to be searched.

A 5. The system must normalize searches so that results are not affected by upper and lower case, diacritical marks, use of upper and lower case letters, use of leading articles, minor variations in punctuation, or spacing.

A 6. The system must allow name, title, genre, and subject searches, with no requirement that users enter a full heading or derived search keys.

A 7. Keyword searching must allow for truncation (e.g. comput* would search for all variations).

A 8. Keyword searching should not have to be an exact match search. If no results are found, terms should be dropped in order to attempt to find results, favoring the most specific results.

A 9. When a user enters an invalid term, the system must display a readable message describing the cross-reference. The user must then be able to conduct that search by clicking on it, and without having to re-key the search.

A 10. The system must retain, on the screen, the term or terms used as a search argument for an inquiry against the database to allow checking for errors in input if no matches are found and to validate which terms were found in the system.

A 11. The system must have easy-to-follow, patron friendly prompts throughout the inquiry process.

A 12. The system must display on one screen without scrolling, the options for the next stage of a search process as each preceding stage is completed.

A 13. The system must allow string searches. That is, the system allows users to enter keywords without Boolean connectors and process a search as if Boolean connectors were example, "United States Supreme Court" will retrieve records containing this specific phrase.

A 14. The system must allow multiple terms to be joined by using Boolean operators (NOT, OR, NEAR, SAME, WITHIN, and ADJ) and linking operators (e.g. AND

A 15. The system must enable searching using relational operators (e.g. less than, great equal to, less than or equal to, greater than or equal to and not equal to.

A 16. The system must permit browsing through the catalog by allowing users to enter available form of search arguments and then display index entries that are alphabetically close to the terms entered.

A 17. The system must inform the user of the number of records that satisfy the search specifications and display brief bibliographic data for them as specified. The us then be able to page forward and backward through the individual records.

A 18. The system must allow the user to return easily via a single click to the browsing search mode, by using an on-screen button or the 'Back" button in the browser.

A 19. The system must automatically include "see" and "see also" references in the alphabetical listing of the authority forms in the authority list to direct the patron to the valid form.

A 20. From the display of one record, the system must offer the option of displaying related works.

A 21. The system must be able to display records for items with a status of "on order."

A 22. The library must have the ability to suppress the display of any title or copy while retaining the record in the database for staff display.

A 23. All searches done by PAC users must be logged. The system must generate reports that permit authorized library staff to analyze patron searches. Statistics on the types of searches patrons do and the time (hour of the day) when searches are performed should also be reported. These reports and statistics must be sortable by location.

A 24. Bibliographic records for the same title must display from newest to oldest.

A 25. The system must enable search nesting through the use of parentheses.

C2. PAC - Search Results

A 1. All searches must result in either the display of a record or a browse list. The system must not respond with a negative "no hit 'message.

A 2. A title search that points to a single bibliographic record will display that record in full, including specific copy/holdings information *on the first screen*. The system must not display a title with a reference to the linked items, or a browse list.

A 3. A name search that matches a single name must display a list of that author's titles and not a browse list of authors.

A 4. The item status screen must display the call number, location and status without having to key a separate request for this information. Other item status information must be library-defined.

A 5. There must be an option to display brief bibliographic records, full bibliographic records or MARC records.

A 6. FCPL must be able to define the display order and field tags for the brief and full bibliographic display.

A 7. A title browse list must display location, call number, and shelf status or at the user's option, omit these details.

A 8. Item status information must display automatically with a bibliographic record. It must never be necessary to request status information as a second step after bibliographic information has displayed.

A 9. It must be possible to apply 'limit by' capabilities to search results with multiple headings by any field in the MARC record (e.g., limit all subject headings retrieved). Limit options should include at least the following:

A language
A material type or format
A publisher
D, 9/01 where the item is located
A year of publication
A nature of contents
A juvenile materials

A 10. Search results from a keyword search must not return the same bibliographic record multiple times.

A 11. The system must not return a bibliographic record that has all attached items marked for suppression of display.

A 12. The system must allow the user to perform multiple limits on a single search, and to back up to a previous limit level in order to refine further a search query.

A 13. The system must have the option for search results to display only those titles held in the location from which the search was executed.

A 14. A patron must be able to easily repeat a search (via a pull-down menu) against another location or against the entire shared database.

A 15. The search strategy and number of hits returned by each search must be displayed.

A 16. The system must enable the user to page back and forth within the list of records retrieved by any search.

C3. PAC - Printing and Downloading

A 1. The PAC must permit printing from the screen. A full sheet of paper must be used.

A 2. Printing must be available either to a printer attached to the workstation or to a shared printer on the network.

A 3. When accessing a printer from remote terminals, users should be able to select their own printer attached to the remote computer.

A 4. The PAC must have a method of printer access control that prevents unauthorized printing or limits the number of citations printed, as determined by the library's policies.

A 5. The system should allow patrons to download information from the PAC to a disk or send it via the Web to their personal email account.

A 6. The number of pages that will be printed will be displayed before printing. The user will have the option to cancel the print job after the number of pages are displayed.

C4. Access to Other PACs and Databases

A 1. Accessibility to other library PACs, library-licensed databases, remote networks and the Internet must be available through the PACs, whether such stations are located in the library or remote.

A 2. The PAC must accommodate remote PCs via a web browser over the Internet. The system must use the same user interface and/or search strategies that are specified for local or remote public access workstations.

A 3. The system must provide a listing of accessible databases from the initial PAC screen.

A 4. When the user chooses to access a database through the PAC, the system should require the patron to identify himself/herself by ID number and optionally a P

A 5. The system must use library-defined parameters from the patron database to determine whether this patron may be allowed to access the chosen database.

A 6. The system must maintain a complete statistical package describing the database usage counts, including time of day, workstation location, databases accessed and the patron types accessing them. The data for these reports shall be automatically compiled and saved by the system and be immediately retrievable by a browser-based, point-and-click, report generator.

A 7. The system must accommodate standard communications protocols and networks, in particular, Ethernet TCP/IP compatibility.

A 8. The system must provide for Z39.50 Client/Server interfaces. The system must have had a fully functioning Z39.50 module in current release and installed in libraries for the last **four** years. Alpha or Beta test sites are not considered valid fulfillments of this requirement.

A 9. The system should offer the ability to broadcast multiple Z39.50 searches at one time with the ability to view results by responding server.

E. Serials

A 1. The system must include the following capabilities:

- A ordering
- A check-in
- D, 12/01 claiming
- D, 12/01 routing
- D, 12/01 fund accounting
- A report generation

A 2. The system must provide the ability to search for serials records by at least title, variant title, call number, ISSN, publisher, vendor, location, uniform title, corporate author/title, conference title, linked title, keyword, subject, or bibliographic utility assigned number.

A 3. When the issue the operator has in hand is the issue that is expected, a single keystroke records the receipt.

A 4. With each check-in the system must automatically record the issue chronology, record the date received, record the number of copies received and claim any copies expected and not received and any issues skipped.

A 5. The system will predict issue chronology and enumeration based on a pattern entered in the control record by the operator. This pattern provides for up to four subdivisions in the enumeration.

A 6. Custom naming patterns can be also be established for each control record. For example, date (April 30, 2001), month (May), Season (Summer), and numeration (v. 1 #3).

A 7. The system must allow modification of the expected receipt date information and the pattern at any time.

A 8. When checking in an issue, if the received issue is not the expected issue, but does conform to the predicting pattern, the system proposed must enable the operator to simply override the predicted number.

A 9. If the issue received does not conform to the predicting pattern (e.g. a special supplement), the operator can enter the issue designation overriding the prediction.

A 10. The system must have the ability to show gaps in holdings.
A 11. The system must be able to print listings of gaps in holdings.
A 12. The system must be able to distinguish among multiple copies from the same or different sources.
A 13. The system must support the check-in of multiple copies of an issue on a single check-in screen even when these copies are accommodated in separate records.
A 14. The system must be able to automatically summarize individual issue holdings into a consolidated statement of holdings.
A 15. The system must be able to display the enumeration and chronology of the most recent issue of a title recorded in the system on a copy specific basis.

A 16. The system proposed must detect duplicate orders for all formats and alert the operator.
A 17. For titles with a predictable pattern of enumeration and chronology:
- A check-in of issues earlier or later than the next expected issue must be possible using a minimum number of keystrokes
- A the operator must not be required to key any data into the check-in screen except to indicate the number of copies received when this more or less than the number of copies expected by the system
- A check-in of issues earlier or later than the next expected issue must be accomplished by the operator keying adjustments to the expected issue information displayed.
- A accept the change of pattern of enumeration or chronology by authorized operator
- A be able to archive old check-in information and automatically create a new check-in screen

A 18. For titles that do not have a predictable pattern of enumeration or chronology, the system must function so as to require a minimal keying of data by the operator.
A 19. The system must be able to accept check-in data by scanning the barcode issue identification printed on serials, as well as by operator keying.
A 20. Recognition of overdue issues must be available regardless of whether or not the title is received on a paid subscription.
A 21. The system must maintain the following subscription information:
- A copies and issues to receive for each subscription
- A expiration of each subscription
- A vendor for each subscription
- A order record for each subscription

D, 12/01 22. The system must support a variety of selection criteria for generation of multiple claims,
- D, 12/01 including, but not limited to:
- D, 12/01 claims to a specific vendor
- D, 12/01 claims for issues that ought to have been received by certain dates
- D, 12/01 all claims

F. Statistics

A 1. The system must provide separate and combined statistics and generate detailed reports both online and in hard copy for all locations.

A 2. At a minimum the system must collect the following statistics:

- A total number of searches
- A number of searches by type of search
- A number of searches against each section of the classification schedule
- A number of searches attempted in other databases
- A help requests
- A number of citations printed and/or downloaded

A 3. Statistical reports must be available describing utilization of the collection (or parts of it) to aid in new item selection, weeding, storage decisions, etc.

A 4. The system must also collect the number of times each item has been checked out. This figure must be sortable by location.

G. Reports

A 1. The system shall provide a wide variety of standard reports that are derived from data that the system automatically compiles. These standard reports should be generated on demand from menu options.

A 2. In addition to the standard management/statistical report capability the system must contain an easy-to-use report generator that does not require special training to use and is provided as a base element of the proposed system. Reports generated by this utility may not contain lists of dead reports, as they existed at the time of report compilation.

A 3. These reports shall come from a statistics set automatically compiled by the system, and retrievable, sortable, and produced by a point-and-click, Web based interface. This report writer facility shall be available externally to and in addition to the system's custom report generator.

A 4. The system must not maintain basic statistical information in item or patron records so that those records can be deleted/purged at any time without impacting on current historical statistics.

A 5. Patron statistical information may be obtained from a specific field or a combination of fields on the patron record (status, location, issuing agency, last activity date, etc.).

A 6. The following reports must be standard reports that are available without any customization:

- A number of patrons currently registered, by patron, status, type issuing agency demographic data, and date the card was issued
- A list of items by location and Library defined status (e.g. lost, missing, etc.)
- A reports on overdue materials based on Library-selected parameters (e.g. patron type, number of days overdue, etc.)
- A total number of bibliographic records and items in the database by location or library unit
- A number and type of transactions by workstation
- A list of items that have not circulated in a specified period of time
- A list of items with "lost" and other statuses that are specified by the user

A 7. The system must be able to print by location and/or system wide and in shelf list order, reports of all items circulated less than a user specified number of times to facilitate collection weeding.

A 8. The system must be able to generate fiscal and year end reports. FCPL must be able to define its year-end.

A 9. The system shall produce a report, on demand, sorted by location and call number, for a specified call number range of records to facilitate collection development.

A 10. The system shall report an inventory of any portion of the collections, by scanning items on the shelves using a portable optical reader or by printing a report in shelf list order that

includes all current statuses.

A 11. The system must generate reports that are library specific or include a defined set of locations.

A 12. The system must allow reports to be generated and printed at a central site or remotely.

A 13. The system must allow data to be collected and reports created and scheduled for different time blocks (hours, days, months, years), stations or locations.

A 14. The system must allow overdue item verification by generating a list of all overdue items in shelf list sequence by library location so that the shelves may be checked before overdue notices are sent. The system must provide for limiting this list to include only newer overdue items (FCPL specifies the number of days).

A 15. FCPL must be able to specify the number of overdue notices and reminders prepared and printed for each overdue notice. All overdue notices must show the date due, author, title, call number, and barcode number. This notice must also contain a free text space where FCPL can design what text the notice will include. The vendor must indicate how many lines and/or characters this free text space contains.

A 16. Overdue notice generation must be controlled automatically by library specified intervals between notices. The stored calendar of days of operation must be consulted by the system before overdue and other notices are printed.

A 17. The system must provide for the printing of billing and hold availability notices. Billing notices shall display the due date, author, title, call number, barcode number', cost of replacement, processing cost and other FCPL specified charges.

A 18. The system must provide for the electronic notification of overdue and billing notices, and hold availability notices.

A 19. Staff must be allowed to schedule printing of any notices or reports at any specified date and time including off hours in unattended operation after printer and stock have been aligned.

A 20. A report must be available that lists outstanding overdue items with a date to be specified by FCPL.

A 21. The system must be able to discharge long overdue items by declaring them to be lost and billing the borrower accordingly.

A 22. The system must allow for modification of text of all automatically generated notices after initial set-up without vendor intervention.

A 23. Authorized personnel must be able to generate printed lists of all of their delinquent borrowers, delinquent borrowers in a certain category (such as by patron type, or over a specified number a books).

A 24. The system must be able to suppress the production of overdue notices on items with missing, claims returned and other statuses specified by FCPL.

A 25. The system must enable an authorized user to produce lists and counts of serials issues checked-in, claimed, and/or to be claimed.

A 26. The system must enable an authorized user to produce a variety of statistical reports including number of serials titles, copies, issues checked in by period, claims issued by type, supplier, etc., and titles without current subscription.

A 27. On any database reports involving materials FCPL staff must be able to select items for inclusion based on any combination of bibliographic information and on any combination of control information (e.g. number of circulations, number of holds).

A 28. The system must enable an authorized operator to specify the starting date and time and ending date and time which the report is to cover on reports involving historical data.

A 29. The system must be able to print a report that lists items with a publication date older than a library specified date and also items published within a library specified range of dates to assist in collection weeding. This report would list the call number, title, date of publication and location.

H. Inventory

D, 9/01 1. FCPL staff must be able to monitor the inventory status of any portion of a library's collection.

D, 9/01 2. The inventory process must identify items accounted for in inventory checks, items found on shelf with a "non-shelf 'status, incorrectly shelved items, and items which the database indicated were on the shelf, but were not found by the inventory scanning process.

D, 9/01 3. The inventory date must be added to the item record for each item inventoried.

D, 9/01 4. Inventory must also identify bar-coded items found on the shelves for which there are no item records in the database.

D, 9/01 5. It must be possible to load the inventory results obtained by using an optical scanner into the system and have them compared against the database and transaction file of the library (circulation records compared with shelf list and items found on the shelves).

I. Detention Center Library Requirements

At this time the Detention Center Library is not automated. There will be no bibliographic or patron records to convert. FCPL staff will add these manually after the system wide automation is complete. FCPL expects all software modules to have the same functionality as for the rest of the system except where FCPL has chosen to turn off functionality for this location. The requirements of this facility are noted below.

H. Inventory

A 1. Detention Center Inmates are not allowed access to the Internet. If the PAC for this location is Web based, access to anything but the PAC must be blocked.

A 2. Items held at other locations must be blocked from this PAC (only items owned at this location must show in this PAC). Also, items held at this location must be blocked from the PAC for the rest of the system.

A 3. The PAC must be icon or menu driven, use simple language, and be very user friendly and easy to use. Since many of the Detention Center inmates have low reading levels these factors are very important.

A 4. FCPL must be able to create several levels of Circulation user log ons. Some with only the ability to check materials in and out with no access to the patron database, fines and fees owed, items checked out or other circulation information.

A 5. Patron barcodes used for this location can be different from barcodes used in the rest of the system.

A 6. Reports of items checked out to a particular patron must be available to FCPL staff on a daily basis.

A 7. The software used for this facility must be the same software used for the rest of FCPL and loaded on the server at the Headquarters Library at FCPL.

Community Information

FCPL currently has a Community Information database that is separate from our main catalog and database. The following requirements must be met by all vendors:

A 1. The vendor must support USMARC Community Information format.

A 2. All search, information and help screens must be customized to reflect Community Information. For example, a search option would be "organization' 'not "author."

A 3. FCPL staff must be able to define display tags appropriate to community information. It must also be possible for FCPL to modify/customize Library-specified menus and displays without programmer or vendor intervention.

A 4. FCPL must be able to choose which USMARC fields appear on any displays. For example, the call number field would not appear since it does not apply to Community Information. Instead the contact information field (#270) would be displayed.

A 5. Vendors must support the 856 field. This field is used to provide links to the different organizations Web sites.

A 6. If a Vendor proposes that the Community Information database be integrated with the main database their software must allow a library patron to search only the Community Information database. It must be very easy for a patron to determine how to search the Community Information database. This could be accomplished by having Community Information as a separate menu choice, or a listed separately on the search options.

A 7. Community Information records must be created, edited and deleted following the same capabilities and procedures as bibliographic records.

A 8. It must be possible to date Community Information records (MARC field 5 0 1) and easily generate reports of records that need to be updated and/or verified. It must be possible to view these reports online or print them. If printed the reports should print one organization per page.

A 9. The system must allow all or parts of the Community Information database to be printed, downloaded to disk or displayed. For example, it must be possible to print a list of all the Lions' Clubs with contact information.

A 10. The system must be able to generate a report that prints the entire database, one record per page that is in a format appropriate for mailing to organizations for updating* purposes.

A 11. The system must allow FCPL to choose which US MARC Community Information fields will be included in a record.

A 12. The Community Information database must be accessible through staff workstations and PACs.

A 13. The system must be enable FCPL to control different levels of access to the database.

A 14. The proposed system must enable authorized users to search the Community Information database by the name of the organization, subject headings, keyword, contact person, program/event and date file was last updated.

A 15. The system must also enable authorized users to use Boolean operators for searching.

A 16. It must be possible to search the Community Information database with the command structure used for accessing the online public access catalog and all other system modules.

K. Training

__A__1. The vendor must provide basic training in all functioning subsystems for the independent operation of the system, including regular maintenance and troubleshooting.

__A__2. The vendor must conduct all training on site. If this is not possible the vendor must specify where the training will be held and what additional costs are involved.

__A__3. The vendor must provide instructors and all necessary instructional materials that may be required for effective instruction and training.

__A__4. All training for all system functions must be hands-on.

__A__5. The vendor will provide a practice-training database. Any additional cost for this must be clearly stated in the Additional Costs section of the Systems Cost page.

__A__6. Complete system and applications documentation must be available at the time the system is installed. Software documentation must be provided in both hard copy (at least 2 copies) and machine-readable format.

__A__7. The vendor will provide training and instruction for all major system upgrades/revisions.

__A__8. The vendor must provide optional training for future FCPL authorized staff. Any additional cost for this training must be stated on the cost sheet.

__A__9. Documentation updates for all manuals must be provided on a regular basis as enhancements, upgrades and/or changes are made. These updates may be sent to FCPL in hard copy or made available via the Web.

Barcodes

FCPL uses 3 of 9 barcodes. They are 14 digit barcodes with the last digit being a check digit. We use barcodes with one (1) as the first digit for patrons and two (2), three (3), four (4) and six (6) as the fir digit for materials. When we migrated to VTLS in 1994 their system would only accept 10 digit barcode., where one (1) was the first digit of the barcode for materials and two (2) was the first digit for patrons. Since FCPL's barcodes did not meet either of these VTLS requirements they wrote a conversion program allow our barcodes to work with their software. The conversion program changes our barcodes as follows:

Barcode Number	Converted Number
11982002221234 (patron)	2200222123
21982001114321 (materials)	1200111432
31982004443322 (materials)	1300444332

All materials and patrons currently in our database will have these converted numbers. Any successful vendor must be able to accept the full 14 digit barcodes when scanned into the system, but also link those 14 digit numbers to their converted numbers already in the system (stored as patron numbers in the patron database and numbers for items in the item database).

In addition we will also be automating our Detention Center Library when new software is purchased. The barcodes used for this system might be different from those used for the rest of the system. Any vendor software must be able to accept two different types of barcodes, one used only in the Detention Center Library and another used by the rest of FCPL.

Vendors must indicate if both of these conditions for barcodes are compatible with their software and list any additional costs due to these barcode differences in the Exceptions section on the Cost page.

__A__1. The proposed system can accept 14 digit barcodes scanned into the system and 10 digit barcodes stored as patron and item numbers.

__A__2. The system will accept two different types of barcodes used for FCPL, one for the Detention Center Library and another for the rest of the system.

ADD ALTERNATES

The modules covered in this section may or may not be included in any final contract. Vendors can bid on any or all of these modules, but each bid on a module in this section should be separate from the bid on the main section. A cost for each module in this section must be listed separately. FCPL reserves the right to purchase some, all or none of these modules.

I. Acquisitions and Fund Accounting

D, 12/01 1. The Acquisitions Module must be fully integrated with other system modules and must include purchase management, invoice management, fund accounting, reports generation, electronic ordering, canceling orders, reordering and claiming.

D, 12/01 2. Changes made from within the Acquisitions Module shall be reflected throughout the database.

D, 12/01 3. Each order record must be automatically and dynamically linked to a bibliographic record.

D, 12/01 4. Data stored in the acquisitions file shall include but not be limited to:

- D, 12/01 bibliographic information
- D, 12/01 acquisitions type (gift, approval, etc.)
- D, 12/01 status
- D, 12/01 Branch, copy, or fund information
- D, 12/01 invoice information
- D, 12/01 vendor information
- D, 12/01 accounting information
- D, 12/01 requestor
- D, 12/01 destination
- D, 12/01 instructions to vendor
- D, 12/01 internal processing instructions
- D, 12/01 estimated price
- D, 12/01 receiving information

D, 12/01 5. The system shall be capable of retaining all information online for a specified period not to exceed three years.

D, 12/01 6. The system must provide for all information that is no longer needed to be archived to magnetic media.

D, 12/01 7. The system shall accommodate the following acquisitions types:

D, 12/01	prepaid	D, 12/01	membership
D, 12/01	gift	D, 12/01	rental
D, 12/01	lease	D, 12/01	purchase

D, 12/01 8. The system shall accommodate the following order types:

D, 12/01	approval plan	D, 12/01	new order
D, 12/01	pre-paid	D, 12/01	added copy
D, 12/01	standing order	D, 12/01	subscription
D, 12/01	membership	D, 12/01	replacement
D, 12/01	blanket order		

D, 12/01 9. The system must automatically check for duplication based on any indexed field, including title key, at the library's discretion. Changing fields for duplicate detection must be a local choice not requiring vendor or programmer intervention.

D, 12/01 10. If a duplicate exists, a message must be displayed and the order temporarily held until authorized staff releases it.

D, 12/01 11. To facilitate order entry, a large amount of data must be 'defaulted' into a template so it is unnecessary to key the same information repeatedly. The vendor must state how many different templates the library has the option of establishing and maintaining.

D, 12/01 12. The system shall prohibit the assignment of duplicate order numbers.

D, 12/01 13. The system shall display the appropriate screen format and prompts for bibliographic information to be entered or copied from other lists.

D, 12/01 14. The system shall be capable of holding orders for later review and release by authorized staff.
D, 12/01 15. The system must be able to send orders electronically.
D, 12/01 16. The system shall be capable of loading vendor supplied MARC bibliographic data from various sources (e.g. FTP transfer, diskette, Z39.50 transfer).
D, 12/01 17. The system must allow for a variety of order statuses, including but not limited to:

D, 12/01	on order	D, 12/01	claimed
D, 12/01	serial on order	D, 12/01	cancelled
D, 12/01	partially received		

D, 12/01 18. It must be possible to generate reports for any status with specified date ranges.
D, 12/01 19. The acquisitions record shall contain a cumulative status information element to provide history of the order.
D, 12/01 20. The system shall be capable of accepting new bibliographic information about a title at any time after order placement or when its receipt is recorded.
D, 12/01 21. Each change to a fund must be recorded by the system and include the fund affected, change made, date of the change, and individual making the change.
D, 12/01 22. The fund file must include the amount budgeted, the amount encumbered, expenditures year to-date, any uncommitted balance, and any adjustments. The system must also allow the creation of up to four levels of nested fund accounts.
D, 12/01 23. The fund file shall be updated automatically to indicate file encumbrances and debits as a result of actions on the acquisition file.
D, 12/01 24. During the encumbering operations, the system shall allow the operator to encumber automatically at a pre-determined vendor discount to create more accurate fund balances. For example, if the vendor normally allows at least 10% discount, than an operator keying in a $10. 00 order for that vendor shall encumber $9.00.
D, 12/01 25. The fund file shall be updated online as transactions are posted. The system will also allow manual adjustments by authorized users.
D, 12/01 26. The system shall provide a warning alert of fund balances when the level of an encumbered fund reaches a library-specified value.
D, 12/01 27. The system must have the capability to print reports of fund accounts or display them online. These reports must be accessible from within the Acquisitions Module or from a series of Web-browser-based, point and click reports.
D, 12/01 28. The system shall report the number of items and titles received against a particular fund over a specified period of time.
D, 12/01 29. The system must have the capability to accommodate periods during which items are still being received against the previous year's appropriation, giving the library the option as to which year's appropriation to use.
D, 12/01 30. The system must be capable of calculating average annual costs for categories of materials by type and fund.
D, 12/01 31. Fund accounting must adhere to GAAP (generally accepted accounting practices).
D, 12/01 32. A formatted screen with appropriate prompts shall be provided for entry of vendor data.
D, 12/01 33. The vendor file shall include fields for vendor name, contact name, order address and remittance address, telephone and fax numbers, vendor account number, email address, and library-supplied number of days after which claims are made.
D, 12/01 34. The system maintains in each vendor record a list of all the invoices that have been paid to that vendor, showing the invoice number and date, and the amount and date paid.
D, 12/01 35. On order information must automatically be updated when the item is received.
D, 12/01 36. The system should have the ability to automatically create item records for multiple copies during the receipt process.

D, 12/01 37. When receipt of an item is recorded and payment posted, the system shall automatically update all files, including vendor and financial files.
D, 12/01 38. The system shall be capable of handling receipt of items with invoices and items without invoices.
D, 12/01 39. The system shall accommodate credits, refunds, and partial order payment.

D, 12/01 40. An acquisitions record shall be accessible online through at least the purchase order number and date, main entry, title, subtitle, series title, conference title, keyword(s) in title, LC card number, ISSN/ISBN, and SuDocs number/GPO stock number.

D, 12/01 41. The system must allow an individual library to elect to automatically display the bibliographic record and the order record information (number of copies ordered, the collection ordered for, and the date) in the public catalog.

D, 12/01 42. The system shall permit the recording of holds against titles on order and in process.

D, 12/01 43. Staff must be able to search all on-order records before creating acquisition records from within the Acquisitions module.

D, 12/01 44. The system must allow separate copies of selections to be charged to different fund accounts.

D, 12/01 45. Staff must be able to order duplicates of materials already in a library's collection, on-order, or in process for a library.

D, 12/01 46. Any staff with the proper security privileges must be able to override in all accounts.

II. Children's Catalog

A 1. The proposed system must have an icon-based PAC for children with sets of icon (photo or graphical) and preconfigured searches of interest to children developed by library professionals. The searches should have the following characteristics:

- A performed on "live"data
- A search results must be fully integrated with the library catalog and display full item information, including location and availability
- A search results can be exported to a file, printed, saved to disk or sent to an email address
- A patrons or staff can places holds on items displayed

A 2. FCPL staff must be able to design custom pre-set searches to retrieve the best results for standard topics such as science projects, crafts, or specific holidays. Authorized staff must be able to assign appropriate icons to these FCPL designed searches and search results should have the same characteristics as listed in number I above.

A 3. The display of specialized bibliographies, such as Suggested Summer Reading, must be permitted. Assignment of icons must also be permitted for these specialized bibliographies and the search results should have the same criteria as other searches.

A 4. The children's PAC must have fall PAC capabilities and be fully integrated with other system modules and be accessible from all PAC and staff workstations.

A 5. The system software must come with a full set of icons for this module. Additional icons must also be easily added by authorized staff without vendor or third party involvement.

A 6. The system must index children's subject headings separately.

III. Meeting Room Booking

D, 12/01 1. The system must enable authorized staff to book any FCPL meeting room to any user, subject only to policies established by FCPL.

D, 12/01 2. The proposed system must support a booking record including at least the following:

D, 12/01	user ID	D, 12/01	date last booked
D, 12/01	location or Branch Library	D, 12/01	equipment needed
D, 12/01	date created	D, 12/01	current bookings
D, 12/01	date needed	D, 12/01	total bookings
D, 12/01	days needed		

D, 12/01 3. The system proposed must allow meeting rooms to be booked up to one year in advance.

D, 12/01 4. Before allowing staff to book a room, the system must check the calendar to ensure that the date is free.

D, 12/01 5. The system must allow a booking confirmation letter to be created and sent to the user.

D, 12/01 6. A calendar must be on the PAC so patrons can determine what dates meeting rooms are available and/or already booked.

D, 12/01 7. The system must allow authorized staff to cancel any booking at any time.

D, 12/01 8. The system must enable authorized staff to generate and print reports. These reports shall include:

D, 12/01	number of time each room was booked in a library specified period of time
D, 12/01	number of bookings that were cancelled
D, 12/01	lists of selected or all users with bookings for any library specified period of time

IV. Enhanced Searching and Patron Tools

A 1. The system should provide a single point from which patrons can do simple or complex searches. Multiple sources such as, the FCPL catalog, other Maryland public libraries, Internet search engines (e.g. Yahoo, Google), third party databases (e.g. Infotrac) will be available for searching. Patrons can choose where they want to search.

A 2. Patrons can elect to be notified when materials by their favorite author(s) have been ordered and/or received. The system will allow notification by email, print or telephone.

A 3. From the FCPL PAC, patrons can search third party vendors (e.g. Amazon, Barnes & Noble) for materials and purchase them online.

A 4. The system will provide patrons with information on all of the following:

- A a list of what others are reading
- A best seller lists
- A library announcements
- A book reviews
- A book jackets or covers
- A annotations for books and other materials
- A author biographical information

A 5. The system will provide the ability for users to see more titles similar to the ones they have already retrieved.

A 6. FCPL patrons will be able to set up a profile of his/her individual searching and interest preferences.

A 7. The system will provide additional information about selected titles. This additional information should include, but is not limited to author biographies, book reviews, summaries, tables of contents and book covers.

A 8. The system will be able to suggest additional topics or titles to users. This feature will be available to patrons with a single mouse click or keystroke.

A 9. The source of any search results will be clearly displayed and attributed to the source.

N 10. Search results should be rated according to relevancy.

Response To

Request For Proposal

RFP #01-77, (#0000000275) Library Automation Software

Frederick County Public Libraries

For An

Integrated Client/Server Library System

Part 4

"Additional Information"

DRA TAOS

July 12, 2001

Response To

Request For Proposal

RFP #01-77, (#0000000275) Library Automation Software

Frederick County Public Libraries

For An

Integrated Client/Server Library System

4.1
Taos Product Brochures

July 12, 2001

Response To

Request For Proposal

RFP #01-77, (#0000000275) Library Automation Software

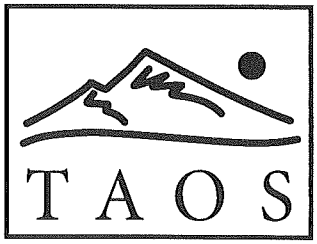
Frederick County Public Libraries

For An

Integrated Client/Server Library System

4.2
Sample Contract

July 12, 2001



DATA RESEARCH ASSOCIATES, INC.
1276 North Warson Road
P.O. Box 8495
St. Louis, Missouri 63132
314-432-1100

and

_____

_____

_____

_____

AGREEMENT

THIS AGREEMENT, made this _____ day of _____, 2001, ("Agreement") by and between **DATA RESEARCH ASSOCIATES, INC.** ("DRA"), a Missouri Corporation, with principal offices at 1276 North Warson Road, St. Louis, Missouri 63132, and <_____>, located at <_____ > ("Customer"), is for the purchase and/or license of the Products and Services described herein and more specifically listed in Appendix A hereto. DRA is authorized to purchase and resell Hardware and sublicense Software manufactured by others, (hereinafter sometimes referred to as "Manufacturers"). Customer wishes to purchase and DRA wishes to sell to Customer certain of the Manufacturers' computer Hardware and licenses for Third Party Software and DRA Applications Software. Customer acknowledges and understands that DRA is an independent contractor and is not an agent of its suppliers or manufacturers.

1. **Definitions**
   a. "Applications Software" is the applications software modules owned by DRA, and licensed to Customer pursuant to the provisions of this Agreement, including computer programs, Documentation, and any subsequent updates.
   b. "Business Day" is defined as 8:00 a.m. through 5:00 p.m., Central Time, Monday through Friday, excepting DRA holidays, a listing of which will be provided to Customer annually.
   c. "Central Processor" is the Hardware component or "Server machine(s)" of the System located in the computer room at the central site that executes instructions and programs of the Operating Systems Software and Applications Software and that is comprised of one or more Central Processing Units (CPU's).
   d. "Documentation" refers to DRA's manuals, handbooks, and user information, regardless of format, relating to the operation and functionality of the System.
   e. "Hardware" refers to third-party computer equipment, Operating Systems Software and related Products purchased pursuant to this Agreement, and warranted by the Manufacturer.
   f. "Operating Systems Software" refers to Software which is sublicensed to Customer herein, which is not Applications Software, and consists of VMS, and/or NT, and/or UNIX related computer programs, instructions, Documentation, and any updates made available to Customer, and warranted by the Manufacturer.
   g. "Product(s)" refers to Hardware, Software, and Services furnished under the provisions of this Agreement.
   h. "Services" refers to DRA maintenance services, equipment services, conversion services, and training services.
   i. "Simultaneous Sessions" refers to the number of simultaneous invocations of the Software.
   j. "Software" refers to computer programs (including databases and authorization keys) and their associated Documentation, regardless of form, whether in source, binary, object, or executable, including, but not limited to the Applications Software, Operating Systems Software, and Third Party Software.
   k. "System" shall refer to the Hardware and Software purchased and/or licensed pursuant to this Agreement.
   l. "Third Party Software" refers to Software sublicensed and/or distributed by DRA, but developed and owned by a Third Party.
   m. "Workstation" refers to a hardware component comprised of at least a CPU, RAM, hard drive, monitor, keyboard and mouse.

2. **Description/Term of Agreement.** The Customer agrees to purchase and DRA agrees to sell, under the provisions of this Agreement, the Hardware and Services at the prices set forth in Appendix A attached hereto and incorporated by reference. DRA agrees to license to Customer, under the provisions of this Agreement, the Applications Software, listed in Appendix A at the prices set forth in Appendix A. DRA agrees to sublicense to Customer, under the provisions of this Agreement, the Manufacturers' Third Party Software at the prices set forth in Appendix A. The term of this Agreement shall commence upon the signing thereof, and shall continue until the mutual obligations of the parties hereto are fully performed.

3. **Contract Documents.** The following documents shall comprise the Agreement between the parties concerning the subject matter of this contract, and, in the event of any dispute concerning construction thereof, shall have the following order of precedence:
   a) This Agreement and all appendices and other documents attached hereto, incorporated by reference;
   b) DRA Response to Customer's Request for Proposal dated <_____>;
   c) Customer's Request for Proposal dated <_____>.

4. **Copyright/Right to License or Sell.** The Applications Software and Third Party Software is protected by copyright and trademark laws and international treaties. Title, ownership rights, and intellectual property rights in the Applications Software and Third Party Software remain in DRA and/or its suppliers. Use of the Applications Software, Third Party Software, and associated Documentation is subject to the applicable copyright laws and the express rights and restrictions of this Agreement. Any rights not expressly granted herein are reserved.

   DRA hereby warrants that at the time of delivery it has the right to grant the Software licenses contained herein. DRA warrants that it has the right to convey a title to Hardware

described herein free and clear of all liens and encumbrances.

5. **Infringement Indemnity.** If notified promptly in writing of any actions (and all prior claims relating to such action) brought against the Customer, based on a claim that the Customer's use of the Applications Software product(s) infringes a United States patent or copyright or misappropriates a trade secret or any other proprietary right of any kind, (hereinafter collectively referred to as "Infringement"), DRA will defend such action at its expense and will pay the costs and damages finally awarded in any such action, provided that DRA shall have sole control of the defense of any such action and all negotiations for its settlement or compromise. DRA shall not have any liability if the alleged infringement is based upon the use, license or sale of the Applications Software or Documentation in combination with other products (including software) not furnished by DRA.

   Customer promises to fully cooperate with DRA, by providing such information and other resources as would be reasonably required by DRA in the course of, or arising out of its defense or settlement of any Infringement claim.

   DRA shall pass through to Customer any and all patent and copyright infringement indemnification, as well as trade secret misappropriation indemnification provided by Manufacturers for their Products. DRA shall have no obligation or responsibility of any kind relative to such indemnification.

   The foregoing states the entire liability of DRA and is the sole and exclusive remedy of Customer with respect to Infringement of any intellectual property rights.

6. **Software License.** The Applications Software, Third Party Software, and Documentation as itemized in Appendix A herein shall be provided to Customer subject to payment of the license fees listed herein, and in accordance with the terms and conditions of this Agreement.

   The rights acquired by Customer hereunder are expressly subject to a non-transferable, non-exclusive, limited license to use the Applications Software and Third Party Software only as specified in this Agreement. This limited license includes the right to use and modify certain proprietary source code files for Customer's own design purposes, for its use in accordance with the provisions herein. DRA is not responsible for any consequences of modifications made by Customer.

   The licensed Applications Software, Third Party Software and Documentation provided hereunder, or any parts thereof, may only be used on the Central Processor(s) on which it is first installed, plus one (1) NT Server if the Web2 product is operated on a separate server, and may only be copied, in whole or in part, for use on such Central Processor(s), except as provided for in Paragraph 7 below, or as otherwise consented to in writing by DRA, and except that Customer may make one copy of the Applications Software and Third Party Software for normal security backup purposes provided that Customer properly reproduces on such copy all notices of copyright, trade secret and any other proprietary rights which exist in the original Software. In the event that an equipment malfunction occurs in the designated Central Processor(s), the Applications Software and Third Party Software (or copies thereof) may be used on another configuration on a temporary basis during such malfunction.

   Customer may not give away, rent, lease, or otherwise sell, sublicense, distribute or transfer the Third Party Software, Applications Software or any modifications thereto without the prior written consent of DRA. Customer understands and agrees that the unauthorized disclosure of the Third Party Software or Applications Software and any modifications thereto by Customer would irreparably damage DRA, and Customer agrees to protect the confidentiality of the Third Party Software and Applications Software to the same extent it would protect its own property. Customer agrees to use all reasonable efforts to ensure that its employees and contractors abide by the terms and conditions of this Agreement.

   Customer may not remove any copyright, trademark, or other proprietary notices from the Third Party Software or Applications Software or the media. Customer agrees to conspicuously display DRA's copyright notice on the logon/start-up screen of the Applications Software. Customer shall use the following notice, or such other reasonable notice as DRA shall from time to time require: **Copyright © 1997-2001 Data Research Associates, Inc. All rights reserved.**

   Customer shall only use such Applications Software and Third Party Software to process its own records, and agrees to exercise diligence in preventing dissemination to unauthorized personnel. Customer acknowledges that the Applications Software and Third Party Software contains valuable trade secrets and proprietary forms of expression. Customer covenants to respect the confidential and trade secret nature of that Applications Software and Third Party Software, by restricting use and access as described herein. Customer promises not to reverse engineer or otherwise recreate the form of expression or underlying ideas, (collectively "Recreate") contained in any portion of the Applications Software and Third Party Software. Customer covenants not to suffer or permit others to Recreate the Applications Software and Third Party Software. No title to or ownership of the Applications Software and Third Party Software or any parts thereof shall be transferred to the Customer. Only the grant of a license authorizes Customer to execute, access or make other use of the Applications Software and Third Party Software. No such authorization is granted by the mere distribution of Software by DRA.

   Customer's use of the Applications Software and Third Party Software is limited to a maximum of <_____> (<___>) Simultaneous Sessions. In the event that Customer desires to use the Applications Software and Third Party Software in excess of this limitation, Customer shall provide written notice to DRA of such intent. In such event, DRA may charge Customer additional license fees.

   The Applications Software and Third Party Software for workstations ("Client" software) is licensed for use by

Customer on the number of workstations stated in Appendix A herein for Client licenses. Customer agrees to monitor such software use, and maintain a listing of the workstations on which the Client software is installed. In the event workstations are no longer going to be used by Customer, Customer agrees to delete all Applications Software and Third Party Software from such machines.

DRA reserves the right to audit use of the Applications Software and Third Party Software for the purpose of verifying compliance with the software license provisions herein. Failure by DRA to audit Applications Software or Third Party Software use, or to enforce any provisions herein, shall not be construed as a waiver of such right by DRA to enforce such provisions at any time in the future.

U.S. GOVERNMENT RESTRICTED RIGHTS
The Applications Software, Third Party Software, and Documentation are provided with "RESTRICTED RIGHTS". Use, duplication, or disclosure by the U.S. Government is subject to restrictions as set forth in subparagraph (c)(1)(ii) of DFARS 252.227-7013, or FAR 52.227-19, or in FAR 52.227-14 Alt. III, as applicable.

DRA shall have the right to terminate (i) any Software license for which the license fee has not been paid, and (ii) any or all of the Software licenses granted hereunder if Customer materially fails to comply with these license terms and conditions. Termination shall occur in accordance with the provisions of Paragraph 23 herein. Except in the event of termination by DRA under the terms specified in this Agreement, the Software licenses granted under this Agreement shall last forever.

The obligations of Customer under this Paragraph 6 are continuing and shall survive the termination, discontinuance or abandonment of this Agreement for any reason whatsoever.

7. **Transfer of License.** DRA agrees to permit transfer of the Applications Software and Third Party Software to a different Central Processor(s) purchased or leased by Customer, provided that Customer shall first obtain the consent of DRA. Such Central Processor(s) shall thereupon become the only Central Processor(s) licensed to use the Applications Software and Third Party Software, and Customer shall certify that all copies of the Applications Software and Third Party Software on the original System have been destroyed. Transfer of the Applications Software and Third Party Software to a different processor may be subject to the payment of additional license and/or transfer fees.

   Nothing in the above is to be construed to grant a right to either DRA or Customer to transfer license to the Software provided by Manufacturer.

8. **Manufacturer's Software.** DRA and Customer agree that the terms and conditions shipped with Manufacturer's Products govern Customer's use of Manufacturer's Software sublicensed and/or distributed to Customer by DRA.

9. **Operating Environment.** At its expense, Customer shall prepare the site to comply with Manufacturer's site requirements. Manufacturers' requirements shall be furnished to Customer by DRA pursuant to this Agreement. Such installation site shall be made available to DRA for installation within five (5) Business Days from the date of delivery of the Hardware.

   Customer shall provide DRA with access to Customer personnel and equipment during normal business hours for the purpose of performing services under this Agreement. This access shall include the ability upon request by DRA, to access the server(s) on which the Licensed Software is operated via ftp and telnet.

10. **Delivery.** Delivery will be made F.O.B. shipping point, with shipping charges to be paid by Customer, including charges (if any) to place the central site Hardware in the desired location for installation. DRA will select the carrier and will request inside delivery to the installation site specified in Paragraph 11 herein. Insurance will be provided by Manufacturer or DRA on the Products while in transit, and such actual costs will be reimbursed by Customer.

11. **Installation.** If specified in Appendix A, DRA will install the central site Hardware and Software at Customer's site specified below following delivery, in accordance with a schedule to be agreed upon by the parties:

    <_____>
    <_____>
    <_____>

    Notwithstanding the foregoing, DRA shall not have the obligation to install the equipment:

    (a) unless the equipment and installation site are made available to DRA for installation within five (5) Business Days from the date of delivery and DRA has been so notified; or
    (b) if the equipment has been modified without DRA's written approval and/or subjected to unusual physical or electrical stress, accident, neglect, misuse or other damage beyond the control of DRA.

12. **Title.** Title to the Hardware shall pass to Customer in accordance with Paragraph 10 herein, subject to the security interest granted pursuant to Paragraph 18 below. Customer understands that no title to Software is granted hereunder.

13. **Force Majeure.** Neither party shall be liable for any damages resulting from any delay in delivery or failure to give notice of delay which directly or indirectly results from the elements, acts of God, delays in transportation, delays in delivery by DRA's vendors, commercial impracticability, or any other cause beyond the reasonable control of the parties. The delivery schedule shall be extended by a period of time equal to the time lost because of any such delay.

14. **Acceptance.**
    a) Acceptance of Hardware. Customer's acceptance of the Hardware sold to Customer by DRA shall occur as follows: The Central Site Hardware shall be deemed accepted by Customer upon operation by Customer for

twenty-four (24) hours without material failure. Testing of remote telecommunications and workstation equipment shall consist of successful demonstrations of equipment performance according to Manufacturers' specifications. **IF SUCH TESTS ARE NOT PERFORMED BY CUSTOMER WITHIN TEN (10) DAYS OF DELIVERY, THEY SHALL BE CONSIDERED WAIVED, AND THE EQUIPMENT SHALL BE CONSIDERED ACCEPTED.**

b) Acceptance of Software. **Customer is responsible for performance of any tests it deems necessary prior to use of the Applications Software with any live data. Customer's acceptance of the Applications Software modules and Third Party Software shown in Appendix A shall occur upon usage of the Product by Customer in its normal daily business.**

DRA's obligation for such nonconforming Products shall be limited to repair or replacement, at DRA's option, pursuant to the warranty provisions of Appendix C and D hereto.

15. **Documentation.** DRA shall provide Customer with Documentation for the Applications Software described in Appendix A, incorporated by this reference, including updates for ninety (90) days from the date of installation. Customer may duplicate such Documentation only as provided for by the Software license granted herein, with the inclusion of DRA's copyright notice.

16. **Training.** DRA agrees to provide Customer with the Services of qualified personnel to train Customer's staff in the operation of the System according to the terms outlined in Appendix A. A maximum of eight (8) persons will be trained in a given session. Customer will reimburse DRA for reasonable travel expenses incurred for such training. Such expenses may include but are not limited to: meals, private hotel or motel room, taxi or carfare, coach airfare, and tips, and are subject to DRA's corporate employee travel expense policies.

17. **Warranties.** DRA agrees to warrant the Products purchased and licensed hereunder according to the applicable warranty terms set forth in the Appendices attached hereto and incorporated by this reference. **THE WARRANTIES STATED HEREIN ARE EXCLUSIVE AND ARE IN LIEU OF ALL OTHER WARRANTIES OF ANY TYPE WHETHER EXPRESS OR IMPLIED, INCLUDING ANY WARRANTIES OF MERCHANTABILITY OR FITNESS FOR A PARTICULAR PURPOSE.**

18. **Payment/Security Interest/Delays.** The purchase price of the Products is set forth in Appendix A attached hereto, exclusive of sales, use and like taxes. Payments shall be made in accordance with the payment terms outlined in Appendix B hereto. If payment is not made within thirty (30) days of Customer's receipt of invoice, or date payable, whichever is later, an interest charge of eighteen percent (18%) per annum will accrue for each additional day the invoice remains unpaid. DRA must be notified by Customer within ten (10) days of receipt of an invoice if that invoice is being contested.

In the event that installation of the Hardware is delayed due to the Customer's failure to comply with site preparation arrangements specified in Paragraph 9 above, payment for the Central Site Hardware will be due upon delivery of the Hardware.

In the event that the installation of the Applications Software is delayed by the failure of Customer to perform site preparation in accordance with provisions herein, the sum listed in Appendix A under Applications Software will be payable within ten (10) days of certification by DRA of such delay.

Customer hereby grants DRA a security interest in those Products purchased herein for which payments remain due under this Agreement. DRA shall not foreclose its security interest so granted as long as Customer is in good faith contesting DRA's allegations of default under this Agreement.

19. **Taxes.** Prices are exclusive of all sales, use and like taxes. If applicable, Customer shall certify, and provide appropriate documentation thereof, that it is exempt from all known federal, state or local sales, use or like taxes. Any tax DRA may be required to collect or pay upon the sale, use or delivery of the Products shall be paid by the Customer and such sums shall be due and payable to DRA upon receipt of an invoice therefor. Any personal property taxes levied after delivery shall be paid by Customer.

20. **Cancellation/Reschedule Charges.** Customer understands that DRA will order the Products set forth herein from DRA's suppliers in reliance upon Customer's promise to purchase these Products under the provisions of this Agreement. In the event Customer cancels any order or portion thereof, or requests a rescheduling and such request is accepted by DRA, Customer agrees to pay to DRA any cancellation or rescheduling charges imposed upon DRA by any of its suppliers resulting therefrom. Customer may not cancel or reschedule any order or portion thereof after shipping.

21. **Insurance.** DRA shall maintain, throughout the performance of its obligations under this Agreement, a policy or policies of Worker's Compensation insurance with such limits as may be required by law, and a policy or policies of general liability insurance insuring against liability for injury to, and death of, persons and damage to, and destruction of, property arising out of or based upon any act or omission of DRA or any of its subcontractors or their respective officers, directors, employees or agents. Such general liability insurance shall have limits of not less than one million dollars ($1,000,000.00) combined single limit per occurrence.

22. **Confidentiality/Ownership of Library Data.** DRA agrees that the records of Customer must remain confidential and further agrees that neither DRA nor its employees will disclose such records or any portion thereof to any person whomsoever without the express prior written consent of Customer.

All bibliographic, item, fine, patron, and other records entered into the database of Customer or supplied to DRA by Customer are and shall remain the sole property of Customer. DRA shall not, without Customer's written consent, copy or use such records except to carry out contracted work, and will not transfer such records to any other party not involved in the performance of this Agreement, and will return submitted records to Customer upon completion of the work hereunder.

Customer shall have the right, without the consent of DRA, to extract such data in industry-standard formats, using standard DRA utilities and at no cost to Customer. Customer acknowledges that the storage compilation, format and layout constitute proprietary and trade secret information of DRA and are protected by federal copyright law. DRA agrees to assist Customer, if requested, in making such extracts, subject to reasonable compensation therefor.

All materials, documents and other information provided by DRA to Customer pursuant to this Agreement shall remain strictly confidential, shall be used only by Customer's agents or employees, and shall not be disclosed to any third party whomsoever without the written consent of DRA. Duplication of Documentation provided hereunder shall be performed pursuant to terms and conditions of Paragraph 15 hereof.

The obligations of Customer and DRA under this Paragraph 22 shall survive the termination, discontinuance or abandonment of this Agreement for any reason whatsoever.

23. Termination. Either party shall have the right to terminate this Agreement if the other party:

(a) Assigns this Agreement or any of its rights hereunder without obtaining the prior written consent of the other party;
(b) Neglects or fails to perform or observe any of its existing or future obligations under this Agreement;
(c) Makes an assignment for the benefit of creditors, or a receiver, trustee in bankruptcy or similar officer is appointed to take charge of all or part of its property; and/or
(d) Is adjudged as bankrupt;

and any of the above condition(s) is not remedied within thirty (30) days after written notice thereof has been given to the other party.

In the event of cancellation and/or termination as set forth above, Customer shall pay DRA for the Services rendered by DRA's employees as of the effective date of cancellation and/or termination based on the then prevailing hourly billing rates for such DRA employees. Customer shall also reimburse DRA for its out-of-pocket expenses, such as supplies and travel. All material, including, but not limited to Software, delivered to Customer (and all copies thereof) shall be returned forthwith to DRA. Any Software licenses granted shall terminate, and the rights, obligations and liabilities of each party shall cease. Customer agrees, upon notice of such termination, to immediately return all copies of the Software, source code, and Documentation provided hereunder to DRA. If Customer refuses to so return the same, DRA shall have the right to pursue all legal and equitable remedies available, including but not limited to repossession of the software electronically. Customer's intentional interference with DRA's ability to exercise its rights hereunder shall subject Customer to such costs as may be incurred in DRA's enforcement of such rights, including but not limited to, reasonable attorneys' fees and court costs.

24. Waivers. No attempted waiver of any of the provisions herein shall be binding unless in writing and signed by a duly authorized representative of the parties hereto.

25. Indemnification. **DRA SHALL ASSUME THE DEFENSE OF, AND INDEMNIFY AND SAVE CUSTOMER HARMLESS FROM AND AGAINST ALL DAMAGES AND LIABILITY RESULTING DIRECTLY FROM GROSS NEGLIGENCE OR WILLFUL MISCONDUCT OF DRA IN THE PERFORMANCE OF THIS AGREEMENT. DRA'S LIABILITY SHALL BE LIMITED TO THE AMOUNT PAID BY CUSTOMER UNDER THIS AGREEMENT.**

DRA WILL NOT BE LIABLE IN ANY EVENT FOR ANY DAMAGES RESULTING FROM LOSS OF DATA, LOSS OF PROFITS, LOSS OF USE OF PRODUCTS OR FOR ANY INCIDENTAL OR CONSEQUENTIAL DAMAGES, EVEN IF ADVISED OF THE POSSIBILITY OF SUCH DAMAGE. THIS LIMITATION OF DRA'S LIABILITY WILL APPLY REGARDLESS OF THE FORM OF ACTION, WHETHER IN CONTRACT OR TORT, INCLUDING NEGLIGENCE. Any action against DRA must be brought within eighteen (18) months after the cause of action arises.

26. Notices. Any notices required or permitted under this Agreement shall be in writing and delivered in person, by facsimile, overnight express, or by registered or certified mail, return receipt requested, with proper postage prepaid, and properly addressed as set forth below or as shall be hereafter changed by written notice. Notice shall be effective upon delivery. Facsimile notices shall also be delivered by mail postage prepaid, or another means listed above, but shall be effective upon facsimile transmission. The parties hereto affirm that the persons below listed are duly authorized to receive and accept such notice:

FOR DRA:

Michael J. Mellinger, President and CEO
Data Research Associates, Inc.
1276 North Warson Road
St. Louis, Missouri 63132
FAX: 314-993-8927

FOR CUSTOMER:

<_____>
<_____>
<_____>
FAX: < >

27. **Severability.** If any provision of this Agreement is determined to be unenforceable or invalid, the remaining provisions of this Agreement shall not be affected thereby and shall remain in full force and effect.

28. **Paragraph Headings.** Paragraph headings used in this Agreement are for the purpose of categorizing the contents of the paragraphs, are for reference only, and are not to be considered part of this Agreement.

29. **Governing Law.** This Agreement is governed by and is to be construed in the United States, under the laws of the state of the principal place of business of Customer.

30. **Press Releases.** DRA shall have the right to include Customer's name in its published list of customers, without prior approval of Customer. With regard to other publicity matters wherein Customer's name is mentioned in relation to Products or Services furnished by DRA, DRA agrees to submit to Customer for approval all such proposed advertising, sales promotion or other copy, and to refrain from publishing or using any such publicity without Customer's prior written consent, which consent shall not be unreasonably withheld. DRA further agrees not to refer to award of this contract in commercial advertising in such a manner as to state or imply that the Products or Services provided hereunder are endorsed or preferred by Customer, unless Customer agrees otherwise in writing.

    DRA reserves the right, without prior consent of Customer, to issue any comments or corrections to any press release in which DRA is mentioned in conjunction with this Agreement or any Services performed pursuant hereto.

    Customer further agrees to permit DRA to issue any press releases it believes are required by the Securities and Exchange Commission, its stock exchange, or any other regulatory body in order to comply with stock exchange disclosure requirements.

31. **Joint and Several Liability.** In the event that Customer is composed of more than one legal entity, then in that event, such legal entities shall be jointly and severally liable to DRA for any and all obligations of the Customer under this Agreement whatsoever, the nature of such obligations to include, by example only and without limitation: payments, confidentiality, restrictive use, restrictive access, operation and maintenance of the system provided by DRA.

32. **Non-DRA Software and Hardware.** Customer shall have the right to install on the System additional software and/or hardware which has not been licensed, sublicensed, distributed or sold by DRA to Customer. However, DRA shall have no responsibility for maintenance or support of non-DRA software or hardware, or for the use or interaction of such products with DRA Products, nor for any adverse effects on the System caused by the use of non-DRA software or hardware. DRA shall incur no additional expense as a result of Customer's use of such products.

33. **Year 2000 Certification.** DRA hereby certifies that the DRA Applications Software is Year 2000 Compliant as defined herein, when configured and used in accordance with the current related Documentation, provided that all other products (the underlying operating system, other software, firmware and hardware) used with the DRA Applications Software are also Year 2000 Compliant. A product defined as being Year 2000 Compliant will produce the same results prior to the year 2000 and after the year 2000. Any Year 2000 Compliant product will handle leap years correctly, and will utilize non-ambiguous representation, handling and interpretation of centuries represented by two digits if such representation is allowed by the product.

34. **Modifications to Agreement.** The provisions of this agreement may be modified if in writing, and if executed by a representative of DRA and Customer authorized to execute legally binding agreements on each party's behalf.

35. **Entire Agreement.** This Agreement is the result of negotiation of the parties and has been agreed to by both parties after careful and prolonged negotiation and discussion. The provisions of this Agreement and its appendices, including such documents as may be incorporated by reference, supersede all prior agreements, oral or written, between the parties. In the event of a conflict between the terms of this Agreement, and the terms of any Purchase Order issued by Customer, the provisions of this Agreement shall control.

IN WITNESS WHEREOF, the undersigned parties have executed this Agreement, in duplicate copies, each of which shall constitute an original, as of the day and year first above written.

<CUSTOMER>

By:_____

Name: _____

Title:_____

Email: _____

Dated:_____

DATA RESEARCH ASSOCIATES, INC.

By:_____

Michael J. Mellinger
President and CEO
Email: Mike@dra.com

Dated:_____

APPENDIX A

PRODUCTS AND SERVICES TO BE PURCHASED

(Please see attached pages)

DRA reserves the right to substitute equivalent products for any third party items quoted herein, in the event of product unavailability or model number changes.

APPENDIX B

PAYMENT SCHEDULE

Customer agrees to pay DRA in accordance with the following schedule:

Hardware and related components:	One hundred percent (100%) of the item upon acceptance, in accordance with Paragraph 14 herein.
DRA Applications Software modules:	Eighty percent (80%) of the cost of the Applications Software module upon delivery. Twenty percent (20%) of the cost of the Applications Software module upon usage of the Applications Software module in Customer's normal daily business.
Third Party Software, Services, Miscellaneous and Reimbursable Expenses:	One hundred percent (100%) of the item as billed.

APPENDIX C

DRA APPLICATIONS SOFTWARE WARRANTY

DRA hereby warrants that the Applications Software furnished to Customer hereunder shall perform in accordance with the current User's Manual for a period of ninety (90) days from the date of Applications Software installation. If DRA is to install any Products but is prevented by causes beyond its control from doing so within thirty (30) days from the date of delivery, the warranty period will commence on the thirtieth (30th) day after delivery. DRA's sole obligation under this warranty shall be to remedy, at no charge to the Customer, any nonconformance to such specifications as soon as is reasonably possible after receipt by DRA of notice of such nonconformance from Customer. DRA further agrees to install in a timely manner all corrections to the Applications Software which are required as a result of nonconformance found by other users of the same Applications Software during the warranty period. Customer shall reimburse DRA on a time-and-materials basis for any warranty claim which, upon investigation, DRA determines is not due to nonconformance of the Applications Software to such specification.

The above warranty is contingent upon the proper use of the Applications Software and shall not apply if:

(a) Customer modifies the Applications Software;
(b) Customer deviates from the Software operating procedures established by DRA in the Documentation described in Appendix A or otherwise provided by DRA;
(c) The Applications Software is operating contrary to the license provisions herein;
(d) The performance of the Applications Software has been adversely affected by the malfunction of Hardware, Operating System software or the network.
(e) Customer fails to maintain the proper environmental conditions for the computer Products on which the Applications Software is operating, as illustrated in the manufacturer's specifications supplied hereunder.

APPENDIX D

HARDWARE / THIRD PARTY WARRANTIES

Manufacturer's Limited Warranty

Manufacturer's Products are warranted to Customer as specified in the Manufacturer's Price List or in the warranty statement accompanying the Product.

NO OTHER WARRANTY EXPRESS OR IMPLIED, SHALL APPLY. MANUFACTURER SPECIFICALLY DISCLAIMS THE IMPLIED WARRANTY OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE. NO REPRESENTATION OR WARRANTY INCLUDING BUT NOT LIMITED TO STATEMENTS OF CAPACITY, SUITABILITY FOR USE OR PERFORMANCE WHETHER MADE BY MANUFACTURER EMPLOYEES OR VAR PERSONNEL SHALL BE CONSIDERED TO BE A WARRANTY BY MANUFACTURER, FOR ANY PURPOSE, OR GIVE RISE TO ANY LIABILITY OF MANUFACTURER WHATSOEVER.

APPENDIX E

PERFORMANCE WARRANTIES

Any performance warranties shown in this Agreement and appendices thereto, apply for ninety (90) days from date of installation of the System, and are contingent upon the Customer maintaining an appropriate minimum configuration as described herein.

Response Time

"Response Time" is defined as that amount of time which elapses between the time the operator signals the computer to perform an operation and the appearance of the first character indicating a system response on the Workstation. This signal is normally either the successful scanning of an item or patron label or entering a command. Response time warranties are the arithmetic average of observed response times during formal testing under either "average" load conditions or "peak" load conditions, and are based on the transaction mix set forth herein. For purposes of evaluating response times, any period of time during which the transaction rate of the System, measured in five-minute increments and pro-rated to hourly rates, exceeds <_____> transactions per hour, shall be considered to be a "Peak Load" condition, and all other periods of time shall be considered "Average Load" conditions. The maximum peak load warranted for this System is <_____> transactions per hour. Response time warranties and testing are based on compliance with current minimum configuration requirements. Response time will be measured using a fully-scripted test distributing transactions equally over a one hour period and at a ratio not exceeding that contracted for. All files and logs shall be preserved both before and after the test for later evaluation.

Transaction Mix

Charge/Renewal	20%
Discharge	15%
Inquiry	60%
Input/Update	5%

Response Time

Transaction Type	Average Response Time Average Load	Average Response Time Peak Load
Charge/Renewal	2 sec.	4 sec.
Discharge	2 sec.	4 sec.
Input Functions	2 sec.	4 sec.
Patron Update	2 sec.	10 sec.
Item Update	2 sec.	4 sec.
Bibliographic Update	6 sec.	10 sec.
Queries (simple)	2 sec.	4 sec.
Searches (item or keyword)	2 sec.	4 sec.
Boolean per term or operator (average search set less than 500 items)	2 sec.	6 sec.

Disk Storage Warranties

DRA warrants that the System as supplied will have at least the following storage capabilities, assuming normal indexing structures:

NUMBERS OF RECORDS

BIBLIOGRAPHIC:	_____
AUTHORITIES:	_____
HOLDINGS:	_____
PATRONS:	_____

Minimum Configuration Requirements

DRA warrants that at the time of System installation, a peak transaction rate of <_____> transactions per hour is supported on this System providing the following criteria are met:

a. A minimum of one (1) gigabyte of server memory for each one hundred (100) Simultaneous Sessions in use on the System is present.

b. A minimum of 20,000 bytes of disk storage for each bibliographic record expected to be stored.

c. No more than <_____> Simultaneous Sessions are in use on the System.

DRA reserves the right to modify these configuration requirements as new releases of the Applications Software are produced. In the event that DRA wishes to change the configuration criteria, Customer will be notified 60 days prior to the product release and given the option of configuring the System for the new release or not taking the new release. In the event that Customer elects not to take the new release, DRA agrees to continue to provide maintenance service on the Applications Software licensed to Customer, without provision for any enhancements or new releases, except repairs to problems reported by Customer. Charge for such service will be 75% of the charge for normal service.

APPENDIX F

RELIABILITY WARRANTY

System Reliability

If Customer has purchased on-site hardware service coverage which guarantees service within four (4) hours following logging of a call, the System sold to the Customer shall be ninety-eight percent (98%) reliable during the System's initial ninety (90) day warranty period.

Reliability shall be determined by deducting downtime from the lesser of the total number of hours the library is in operation, or the hours of maintenance coverage, provided that maintenance coverage equals or exceeds the library's hours.

"Downtime" is defined as that period of time during the above hours, when it is not possible to perform scheduled activities due to equipment or Software malfunctions or when the System is released to DRA for remedial maintenance.

Downtime shall be calculated to the nearest one-tenth (1/10) hour and calculated as a percentage of the Customer's total operating hours, on a quarterly basis. Downtime coefficients are not cumulative.

Table of Downtime Coefficients

Loss of:	
System down	1.00
charge/discharge	1.00
patron file inquiry	1.00
hold features	1.00
item file inquiry	1.00
bib. file inquiry	1.00
file updates, online	1.00
report printing	.25
software problems which affect System performance	.10

ERRORS WHICH DO NOT AFFECT SYSTEM PERFORMANCE SHALL NOT BE COUNTED.

Failure of the System to perform with ninety-eight percent (98%) reliability, as determined by the Customer and accepted by DRA, shall entitle the Customer to a reduction in the DRA Applications Software monthly maintenance fee by ten percent (10%) for each one percent (1%) the System falls below the ninety-eight percent (98%) minimum reliability level. Maximum reduction shall not exceed the amount of the maintenance fee.

It shall be the responsibility of the Customer to:

a) Operate the System;
b) Detect malfunctions;
c) Promptly notify DRA of any System malfunctions; and
d) Maintain appropriate daily records on the operating performance of the System.

IF DURING THE TEST THE SYSTEM FAILS OR MALFUNCTIONS DUE TO THE FOLLOWING CAUSES, SUCH PERIOD OF TIME DURING WHICH THE SYSTEM IS NOT IN PROPER WORKING CONDITION WILL NOT BE COUNTED AS DOWNTIME:

a) Negligence of the Customer or its agents;
b) Malfunction of equipment which was not supplied by DRA;
c) Electrical power or telephone problems of any kind; or
d) Incorrect and improper use of the System by the Customer.

APPENDIX G

CONFIGURATION DIAGRAM

(Please see attached page)

DATA RESEARCH ASSOCIATES, INC.

AND

_____

AGREEMENT FOR SOFTWARE SUPPORT, MAINTENANCE AND UPDATE SERVICE

THIS AGREEMENT, made this _____ day of _____, 2001, ("Agreement") by and between **DATA RESEARCH ASSOCIATES, INC.**, a Missouri Corporation, with principal offices located at 1276 North Warson Road, St. Louis, Missouri 63132 ("DRA"), and _____, located at _____ ("Customer"), is for the following purposes: (a) securing software update service and maintenance on the software described in Appendix A to this Agreement; and (b) providing consulting and support services to assist and advise Customer in the operation of the computer system which is the subject of that certain license agreement between the parties dated _____ ("License Agreement").

1. **Term.**
This Agreement shall commence when signed by both parties, and shall be effective for an initial term of twelve (12) months and shall automatically renew thereafter unless terminated by ninety (90) days' written notice by either party.

2. **Scope of Services.**
During the term of this Agreement, DRA agrees to provide the following services:

A. Software Update and Maintenance Service. To the extent DRA makes generally available to its customers updates to the software listed in Appendix A during the term of this Agreement, DRA shall provide such updates, including appropriate documentation, to Customer at no charge other than that for the media and transportation expense. All such updates and documentation shall be subject to all provisions of the original license for the software. DRA shall remedy any nonconformance of the software in Appendix A with its applicable User's Manual as soon as is reasonably possible after receipt by DRA of written notice from Customer of such nonconformance. Such corrections shall be made at no charge to the Customer other than travel, media and transportation expense. However, Customer shall reimburse DRA on a time-and-materials basis for any claim which upon investigation DRA in good faith determines is not due to nonconformance of the software to the User's Manual. Customer shall also reimburse DRA for time, materials, and travel expenses in connection with any work requested and performed which is not directly related to software maintenance. In consideration for such services, Customer shall pay DRA the monthly fees listed in Appendix A, payable in twelve (12) equal monthly installments commencing thirty (30) days from the expiration of the applicable warranty periods.

B. Telephone assistance to Customer for communications with systems support personnel to procure assistance in identification, verification and resolution of problems, and on-site visits where deemed required;

C. Written responses to Customer Software Service Requests ("SSR's"); and

D. Improvements and enhancements to software reference manuals generally made available to customers during the term hereof.

3. **Eligibility for Service.**

Software is eligible hereunder upon expiration of the applicable software warranty period. The system on which the software resides must be unmodified and properly maintained at the latest revision level. The system must contain at least the minimum equipment configuration and prerequisite software as specified in the original License Agreement between the parties. Maintenance eligibility is also contingent upon proper use of the products by Customer. If services are requested and performed to remedy a malfunction which is due to the following conditions, such services shall be deemed not to be due to nonconformance of the software to the applicable User's Manual and shall be billable on a time, materials and travel expense basis:

(a) adjustment, repair or parts replacement is required because of accident, unusual physical, electrical or electro-magnetic stress, neglect, misuse, failure of electric power, air conditioning, humidity control, transportation, failure of rotating media not furnished by DRA, operation with media not meeting or not maintained in accordance with Manufacturer's specifications or causes other than ordinary use;

(b) products have been modified by Customer;

(c) products as specified by Manufacturer or DRA in the documentation or User's Manual are missing;

(d) products have been dismantled or reinstalled by Customer without the supervision of or prior written approval of DRA;

(e) Manufacturer's serial numbers or warranty date decals have been removed or altered; or

(f) Customer deviates from the software operating procedures established by DRA in the applicable documentation.

4. **Authorization for Service.**

Customer shall provide DRA with the names of up to four (4) people who are authorized to log service calls with the DRA Service Desk and Help Desk. It is expected that the staff who are so authorized have been fully trained in the use of the DRA system. The training requirement may be fulfilled by the named individuals attending DRA training classes, or by being trained by someone who was trained by DRA personnel.

In the event Customer requires additional people to be authorized to log service calls, authorization for additional staff can be purchased for an additional $50.00 per month, per named individual. These individuals must also be certified as fully trained in the use of the DRA system.

5. **Responsibilities of Customer.**

Customer acknowledges and agrees that all software and/or changes, improvements or updates thereto provided to Customer by DRA are subject to the terms and conditions of the software product license contained in the above-referenced License Agreement between the parties. Customer shall provide DRA with access to Customer personnel and equipment during normal business hours for the purpose of performing services under this Agreement. This access shall include the ability to access the server(s) on which the software is operated via ftp and telnet, upon request by DRA, in order to respond to a log placed by Customer. Customer shall maintain a current backup copy of all programs and data.

6. **Most Advantageous Accounting.**
In the event that DRA determines that a service request may be legitimately performed under multiple portions of this Agreement, such services will be performed pursuant to that portion providing the lowest actual cost to Customer.

7. **Charges.**
Customer shall pay the total monthly charge thirty (30) days from the date of receipt of an invoice therefor. If payment is not made within thirty (30) days, an interest charge shall be assessed for each additional day the invoice remains unpaid at the rate of eighteen percent (18%) per annum. Charges are exclusive of, and Customer is responsible for, all sales, use and like taxes (unless exempt therefrom as documented by applicable exemption certificate).

8. **Travel Expense.**
Customer shall reimburse DRA for reasonable travel expense for those services for which such reimbursement is provided herein. Such expenses may include but are not limited to: meals, private hotel or motel room, taxi or carfare, coach airfare, and tips. DRA will invoice Customer for such expenses as occurred, and Customer agrees to pay such invoices within thirty (30) days of receipt thereof.

9. **Price Changes.**
DRA may, at any time after the initial 12-month term of this Agreement, change the price of services provided hereunder by giving ninety (90) days written notice to Customer.

10. **Assignment.**
Neither party shall assign this Agreement or any of its rights or obligations hereunder without the prior written approval of the other party, and any attempt by such party to do so without such approval shall be void.

11. **Force Majeure.**
DRA shall not be liable for any damages resulting from any delay in delivery or failure to give notice of delay which directly or indirectly results from the elements, acts of God, delays in transportation, delays in delivery by DRA's vendors, or any other cause beyond reasonable control of DRA.

12. **Waivers.**
No waiver of any right, obligation, or default shall be implied, but must be in writing, signed by the party against whom the waiver is sought to be enforced. One or more waivers of any right, obligation, or default shall not be construed as a waiver of any subsequent right, obligation, or default.

13. **Exclusion of Implied Warranties/Limitation of Liability.**
EXCEPT FOR THE EXPRESS WARRANTIES STATED HEREIN, DRA DISCLAIMS ALL WARRANTIES, INCLUDING ALL IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE.

CUSTOMER'S RIGHT TO RECOVER PROPERTY DAMAGES CAUSED BY DRA'S FAULT OR NEGLIGENCE SHALL BE LIMITED TO ONE MILLION DOLLARS ($1,000,000.00). DRA WILL NOT BE LIABLE FOR DAMAGES RESULTING FROM LOSS OF DATA, LOSS OF PROFITS, LOSS OF USE OF PRODUCTS OR FOR INCIDENTAL OR CONSEQUENTIAL DAMAGES, EVEN IF ADVISED OF THE POSSIBILITY OF SUCH DAMAGE. THIS LIMITATION OF DRA'S LIABILITY WILL APPLY REGARDLESS OF THE FORM OF ACTION, WHETHER IN CONTRACT OR TORT INCLUDING NEGLIGENCE. ANY ACTION AGAINST DRA MUST BE BROUGHT WITHIN EIGHTEEN (18) MONTHS AFTER THE CAUSE OF THE ACTION ACCRUES.

14. Notices.
Any notices required or permitted under this Agreement shall be in writing and delivered in person, by facsimile, overnight express, or by registered or certified mail, return receipt requested, with proper postage prepaid, properly addressed as set forth below. Notice shall be effective upon delivery. Facsimile notices shall also be delivered by another means listed above, but shall still be effective upon facsimile transmission. The following persons are duly authorized to receive and accept such notice:

FOR DRA:

Michael J. Mellinger, President and CEO
Data Research Associates, Inc.
1276 North Warson Road
St. Louis, Missouri 63132
FAX: 314-993-8927

FOR CUSTOMER:

_____
_____
_____
_____
FAX: _____

15. Severability.
If any provision of this Agreement is determined to be unenforceable or invalid, the remaining provisions of this Agreement shall not be affected thereby and shall remain in full force and effect.

16. Governing Law.
This Agreement shall be governed by the laws of _____ both as to interpretation and performance.

17. Attorneys' Fees.
Should either party be required to file a legal action to enforce any provision of this Agreement, the prevailing party shall be paid its reasonable attorneys' fees and costs by the other party.

18. Ownership of Library Data.
All bibliographic, item, fine, patron, and other records entered into the database of Customer or supplied to DRA by Customer are and shall remain the sole property of Customer. DRA shall not, without Customer's written consent, copy or use such records except to carry out contracted work, and will not transfer such records to any other party not involved in the performance of this Agreement, and will return submitted records to Customer upon completion of the work hereunder. Customer shall have the right, without the consent of DRA, to extract such data in industry-standard formats, using standard DRA utilities and at no cost to Customer. Customer acknowledges that the storage compilation, format and layout constitute proprietary and trade secret information of DRA and are protected by federal copyright law. DRA agrees to assist Customer, if requested, in making such extracts, subject to reasonable compensation therefor.

19. Modifications to Agreement.
The provisions of this Agreement may only be modified in writing, and are binding only if executed by a representative of DRA and Customer authorized to execute legally binding agreements on each party's behalf.

20. Entire Agreement.
This Agreement is the result of negotiation of the parties and has been agreed to by both parties after careful and prolonged discussion. The provisions hereof supersede all prior agreements between the parties

regarding software update and maintenance service and consulting and systems support service, and no change, termination or attempted waiver of any of the provisions hereof shall be binding unless in writing and signed by a duly authorized representative of each party. All other terms and conditions of the License Agreement between the parties, and any amendments thereto, pertaining to matters other than the subject matter of this Agreement, shall not be changed hereby. In the event of a conflict between the terms of this Agreement, and the terms of any Purchase Order issued by Customer, the provisions of this Agreement shall control.

IN WITNESS WHEREOF, the undersigned parties hereto have executed this Agreement in duplicate copies, each of which shall be deemed an original, as of the day and year first above written.

_____

By: _____
Name: _____
Title: _____
Email: _____

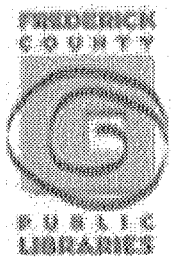
DATA RESEARCH ASSOCIATES, INC.

By: _____
Michael J. Mellinger
President and CEO
Email: Mike@dra.com

APPENDIX A

The following software shall be included under the terms of this Agreement:

Software	Warranty Expiration	Monthly Fee



Response To

Request For Proposal

RFP #01-77, (#0000000275) Library Automation Software

Frederick County Public Libraries

For An

Integrated Client/Server Library System

4.3
Annual Report

July 12, 2001

Response To

Request For Proposal

RFP #01-77, (#0000000275) Library Automation Software

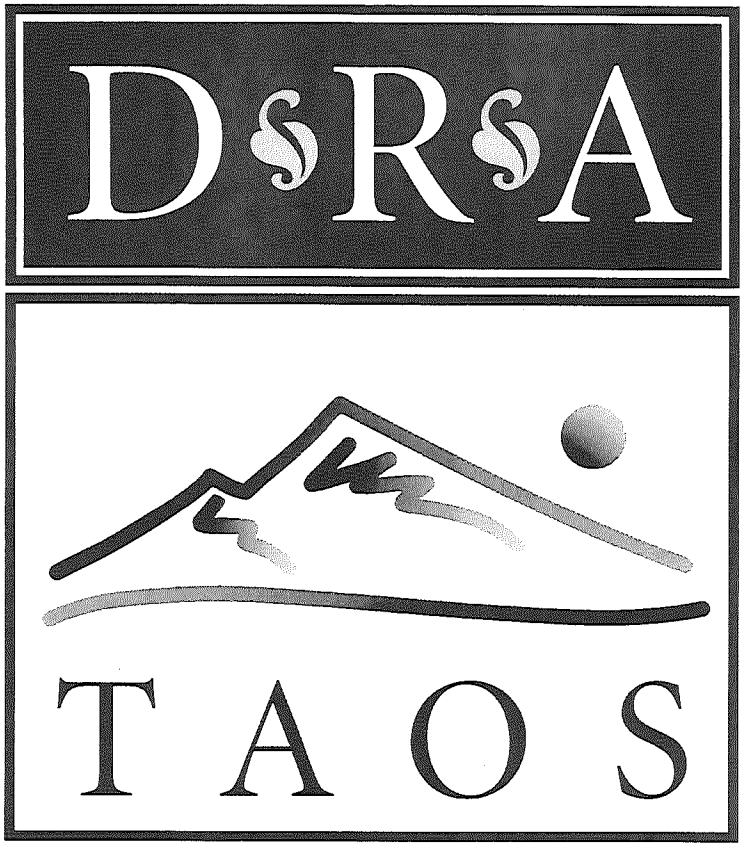
Frederick County Public Libraries

For An

Integrated Client/Server Library System

4.4
Sample Taos Reports and Notices

July 12, 2001



DRA TAOS SAMPLE REPORTS AND NOTICES

DRA TAOS SAMPLE REPORTS AND NOTICES

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The information in this document is subject to change without notice and should not be construed as a commitment by Data Research Associates, Inc.

DRA (Data Research Associates, Inc.)
1276 North Warson Road
St. Louis, MO 63132-1806
1-800-325-0888
Sales@DRA.com

Last Updated: January, 2001

Sample Reports and Notices

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- Count of all patrons 2
- Count of added patrons by date 3
- Circulation by patron category - monthly, yearly, total 4
- Expired patron report 5
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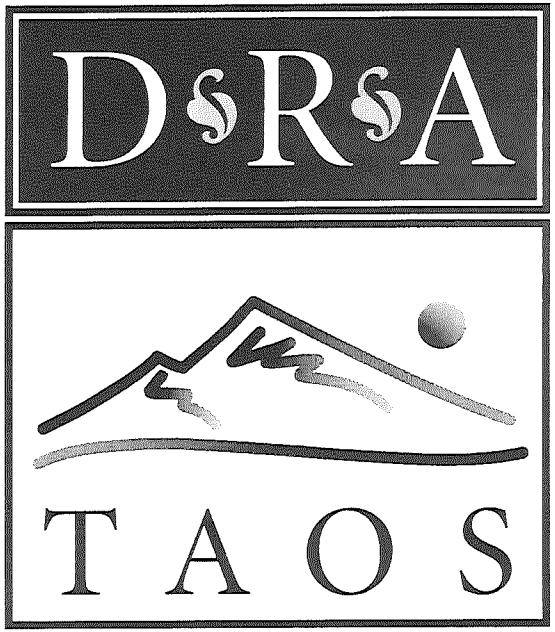


Patron Reports

- Count of all Patrons
- Count of added patrons by date
- Circulation by patron category - monthly, yearly, total
- Expired Patron report
- Expired Patron report by category
- Patrons in category

Count of all patrons

This report counts the total number of patrons registered in a library system.

```
================================================================================
08-DEC-00  04:14 PM                                                    PAGE    1
                              Count of all Patrons

================================================================================

Total Number of Patrons:          1,201
```

Count of added patrons by date

This report counts the patrons added during a date range entered when running the report.

07-DEC-00 03:04 PM PAGE 1

Count of Added Patrons by Date

Date Added	Count of Patrons Added
06/30/2000	1
07/14/2000	1
07/23/2000	4
07/24/2000	2
07/25/2000	1
07/26/2000	3
07/27/2000	2
07/30/2000	1
10/05/2000	1
10/10/2000	1
10/23/2000	2
10/25/2000	1
11/29/2000	5
11/30/2000	1
Total Patrons Added:	26

Circulation by patron category - monthly, yearly, total

This report counts the monthly, yearly, and total patron circulation statistics (charges, renewals, and in-house use) for a library system. The transactions are sorted by patron category.

11-DEC-00 11:04 AM PAGE 1

CIRCULATION BY PATRON CATEGORY

Patron Category	Transactions This Month	Transactions This Year	Total by Category
Adult	310	3112	9331
Child	53	502	1599
NonResident	3	35	105
Resident	520	5220	15660
Staff	36	365	1095
	922	9265	27790

Expired patron report

This report produces a list of all patrons with the status of expired in a library system. It lists the patron name, address, and phone number. The report is sorted by the expiration date of the patron record. The patron barcode and database control number are also listed.

```
================================================================================
07-DEC-00  02:49 PM                                                    PAGE    1
                          EXPIRED PATRON REPORT

================================================================================


Patron:  BRENNER, WAYNE                                          03-AAA-0266
Address:      P. O. BOX 533808 ORLANDO, FL 32853
Phone:                         Exp. Date: 10/06/1994   P000004564


Patron:  STONE, KATHERINE                                        03-AAA-0417
Address:      6335 H FOREST CITY RD. ORLANDO, FL 11111
Phone:                         Exp. Date: 10/10/1994   P000014225


Patron:  MURRAY, BECKY                                           03-AAA-0504
Address:      1914 S. FERN CREEK ORLANDO, FL 32806
Phone:        4075558046       Exp. Date: 10/19/1994   P000019885


Patron:  PREUSS, MARGARET                                        03-AAA-0870
Address:      1106 MAURY ROAD ORLANDO, FL 32804
Phone:        4075554526       Exp. Date: 12/31/1994   P000039057


Patron:  SHAY, JEREMY                                            03-AAA-0940
Address:      5889 CURRY FORD ROAD#B ORLANDO, FL 32822
Phone:        4075554370       Exp. Date: 01/15/1995   P000041624
```

Expired patron report by category

This report lists expired patrons for a patron category selected when running the report. It lists the patron name, address, and phone number. The report is sorted by patron last name. The patron barcode and database control number are also listed.

11-DEC-00 10:52 AM PAGE 1

Expired Patron Report

Name	Patron DBCN	Patron Barcode	Street	City	St Zipcode	Exp Date
			NonResident			
CONNOR, FRANC P.	03-AAA-0206	P000001578	8728 GRANDEE DRIVE	ORLANDO	FL 32829	06/11/2000
HICKMAN, WILLIE	03-AAA-0215	P000002030	353 BABLONICA DR	ORLANDO	FL 32807	08/31/2000
STOTT, GEORGE	03-AAA-0214	1888800083849	7320 BURNWAY DR.	ORLANDO	FL 32819	08/10/2000

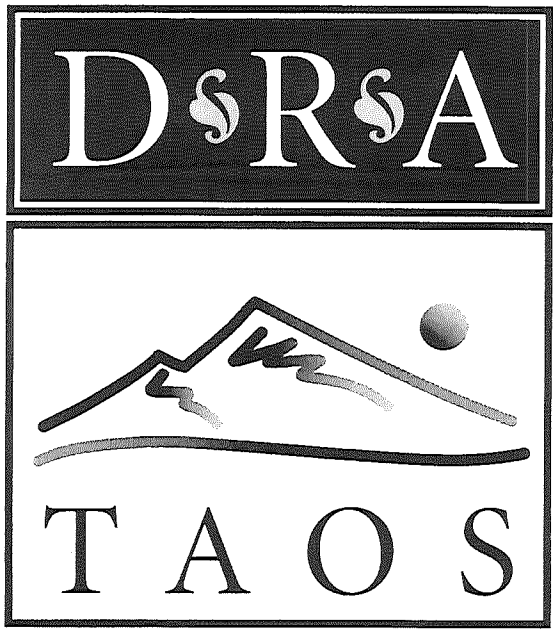
Patrons in category

This report lists all patrons assigned to a specified patron category. The report is sorted in alphabetical order by patron last name. The report also includes information such as patron database control number, address, and telephone number.

11-DEC-00 05:00 PM PAGE 1

Patrons in Category
Adult

Name	Patron Cnum	Street	City	Zipcode	Phone
Eads, Christopher	03-AAA-1195	134 Church St	St. Louis	63110	314-555-2305
Miller, Brad	03-AAA-1188	1294 Crestwood Ct.	St. Louis	63132	636-555-2278
Miller, Craig	03-AAA-1185	200 Elm Lane Apt. 3	St. Louis	63132	314-555-5858
Sils, Evan	03-AAA-1194	6625 Trinity, Apt 3W	St. Louis	63130	314-555-8932
Stevens, Joseph	03-AAA-0286	2206 A Rancho Relaxo Dr.	Maryland Hts.	63031	314-555-0356
Ventura, Jesse	03-AAA-1190	75 Constitution Ave	St. Paul	55155	651-555-1212



Circulation Reports

- Count of loans by patron category
- Patrons by category with materials checked out
- Report of items with status

Count of loans by patron category

This report counts the number of items currently charged to each patron. The report is sorted by patron category.

```
================================================================================
08-DEC-00  04:24 PM                                                  PAGE    1
                      Count of Loans by Patron Category

================================================================================

PATRON CATEGORY:   Adult


Eads, Christopher                                        2
Miller, Craig                                            2
Sils, Evan                                               4
Ventura, Jesse                                           2


PATRON CATEGORY:   Child


EVANS, JUDY                                              1
Reeves, Katherine                                        2


PATRON CATEGORY:   Resident


DAVIS, NINA                                              1
GRAHAM, DELORES                                          1
HALLSTROM, MARK                                          4
HEARD, ANITA                                             6
Jones, Michelle                                          1
JONES, HARRY                                             4
LABORE, TRICIA                                           4
Miller, Christine                                        1
Miller, James                                            1
Miller, Patrick                                          2
PARTRIDGE, MARGARET                                      1
RICHARDS, CARLEEN                                        1
```

Patrons by category with materials checked out

This report counts the number of items currently charged to each patron. The report is sorted by patron last name and includes patron address and phone number.

```
================================================================================
08-DEC-00  03:56 PM                                                  PAGE    1
                Patrons by Category with Materials Checked Out

================================================================================


Patron:  ABPLANALP, FLORENCE
         5604 BISHOP GRADY CT. #91 ORLANDO, FL 32808
         407-555-0328

         Category: NonResident              Items out:       1

Patron:  ACEVEDO, ISMAEL
         5436 HERMOSA ST. ORLANDO, FL 32807


         Category: Staff                    Items out:       5

Patron:  ACOSTA, NELIZABET
         7317 RIVERSIDE PLACE ORLANDO, FL 32810
         407-555-9416

         Category: NonResident              Items out:       3

Patron:  ADAMS, HELGA
         6891 TAMARIND CIR. ORLANDO, FL 32819
         407-555-8496

         Category: NonResident              Items out:       8

Patron:  ADAMS, SHARON
         6450 FOXBRIAR TRAIL ORLANDO, FL 32818
         407-555-8711

         Category: NonResident              Items out:       1
```

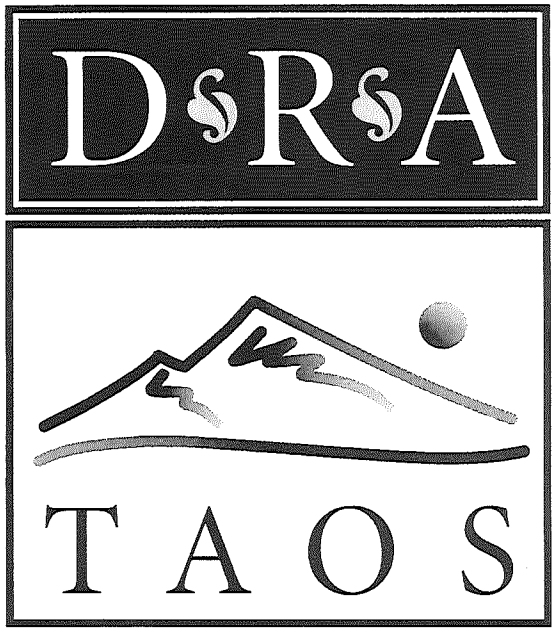
Report of items with status

This report lists all items with a specified status. Status options include: Damaged, Missing, Withdrawn, Fine Exempt, Non Circulating, Assumed Lost, Claimed Lost, Claimed Returned, Library Loaned, On the Fly, Shelving, En Route, On Hold, In Processing, On Order, Local Request, Non Requestable, Defered Request, Recalled, and Rush Recalled. The report is sorted by call number and lists the item title, author, and barcode number.

```
================================================================================
11-DEC-00  05:17 PM                                                    PAGE    1
                          Report of Items with Status
                                    EnRoute
================================================================================

Call Number  Title                              Author          Item ID

917.804      The essential Lewis and Clark      Lewis, Meriweth 0888800296152
ADULT FICT C The bear and the dragon / Tom      Clancy, Tom, 19 0888800296194
B72 G68 1989 God, the devil, and the perfec     Govier, Trudy.  0888800295048
BF637.C4 J64 Who moved my cheese? : an amaz     Johnson, Spence 0888800295717
CI772 .L11   Creating wealth / Robert G. Al     Allen, Robert G 0888800111500
CY854 .H28   London fields / Martin Amis.       Amis, Martin.   0888800237727
DD888 .U11   The human organism; an introdu     Horrobin, David 0224700214550
EQ993 .G5    The complete job-hunting guide     Danks, Lawrence 0888800129205
FF25 .R35    The hunt for Red October / Tom     Clancy, Tom, 19 0224701212082
FIC BAK      Raptor red / Robert T. Bakker.     Bakker, Robert  0888800295675
GZ190 .R58   The human brain / Dick Gilling     Gilling, Dick.  0224701145035
HG5652 .S68  Fortress Switzerland : the glo     Starchild, Adam 0888800295097
HM304 .K12   Building : the fight against g     Salvadori, Mari 0224701396927
JJ41 .O50    The healing hand : man and wou     Majno, Guido.   0888800130005
NK622 .A92   The human brain / Dick Gilling     Gilling, Dick.  0224701397487
PE763 .Q92   First family : a novel / by Pa     Anderson, Patri 0224700680289
PK119 .D98   Gravity and the astronauts / i     Greeman, Mae.   0224701366250
PS3553 .L245 The bear and the dragon / Tom      Clancy, Tom, 19 0888800296228
PS3568.U812  Straight man / Richard Russo.      Russo, Richard, 0888800295113
QL70 .V26    The lighter side of gravity.       Narlikar, Jayna 0224700205335
RI677 .X86   Life in a medieval village / G     Morgan, Gwyneth 0888800129858
SQ116 .J19   The hunt for Red October / Tom     Clancy, Tom, 19 0224700679950
SR527 .Z43   The avatar / Poul Anderson.        Anderson, Poul, 0224701595023
TX911.3.M27  Check-in check-out / Gary K. V     Vallen, Gary K. 0888800295410
```



Collection Development Reports

- Item count by material type
- Items in category
- Count of authority records
- Count of authority records by encoding level
- Count of holdings records
- Bibliography of titles at location
- Count of titles by record type and bibliographic level
- Items added with count by location
- Titles in a call number range
- New titles report
- New titles in the collection

Item count by material type

This report counts the number of items assigned to certain material types. Material types include such categories as paperback, new title, CD, video, and periodical.

18-DEC-00 10:49 AM PAGE 1

Item Count by Material Type

Material Type	Count
Book	100,653
Periodical	544
Video	27
CD	2
Microfilm	1
Software	3
Kit	1
Total Materials:	101,231

Items in category

This report lists all items within a specified item category. The report is sorted by call number and includes the item title, author, barcode number, and item status.

18-DEC-00 11:24 AM PAGE 1

Items in Category:
Book

Call Number	Title	Author	Item ID	Item Status
AA420 .K22	A woman's intuition.	Barclay, Tes	0224701001733	
AA510 .V69	Kiss Daddy goodbye.	Altman, Thom	0224701635258	
AA610 .D32	Forerunner foray [by] And	Norton, Andr	0224701178887	
AA860 .D77	Safe passage.	Bache, Ellyn	0224701636140	
AB361 .C3	Jane Fonda's new workout	Fonda, Jane,	0224701142321	
AC100 .I58	The great American magazi	Wainwright,	0224701474062	
AD540 .J90	Summer masquerade / Donna	Ball, Donna.	0224701642304	
AE193 .Q11	Desktop publishing / Fred	Davis, Frede	0224701474336	
AE459 .A98	King's fool.	Barnes, Marg	0224701642080	
AF443 .T1	The New York times natura	Tarr, Yvonne	0224700218171	
AF501 .G8	The night of the Ripper /	Bloch, Rober	0224701543965	
AH197 .P52	A diabetic doctor looks a	Lodewick, Pe	0224700973361	
AH53 .K8	Mind : the human differen	Taylor, Davi	0224701477461	
AH566 .G38	The new birth control pro	Garfink, Chr	0224701405314	
AH589 .J78	Self-defense for women :	Peterson, Su	0224700972298	
AI935 .Y31	The great American magazi	Wainwright,	0224700211572	
AJ221 .R6	Low Sugar Secrets for you	Vaughan, Wil	0224701142446	
AK722 .B19	Prime time; the life of E	Kendrick, Al	0224701200632	
AL850 .N78	The heaven tree.	Pargeter, Ed	0224701569762	
AM165 .Y18	Monsieur Pamplemousse and	Bond, Michae	0224701543973	
AN445 .Y91	Charco Harbour: a novel o	Blunden, God	0224701633915	
AN918 .T63	Asking questions.	McLaughlin,	0224700950278	
AO598 .O61	Bradford Angier's Backcou	Angier, Brad	0224700217736	
AQ826 .G58	Death to the landlords! [	Peters, Elli	0224701520633	
AR88 .N79	The incredibly lazy perso	Blaun, Randi	0224701341154	
AT705 .Q63	Bedside manners : your gu	Crenshaw, Th	0224701340891	

Count of authority records

This report counts authority records using the record type field in the authority datafile.

```
================================================================================
11-DEC-00  05:23 PM                                                  PAGE    1
                          Count of Authority Records

================================================================================


Rec    Count
Type

z           64,266
```

Count of authority records by encoding level

This report counts authority records by encoding level using the authority datafile. This report could also help in identifying incomplete encoding levels.

```
================================================================================
18-DEC-00  01:21 PM                                                  PAGE    1
                          Count of Authority Records
                              By Encoding Level
================================================================================


Encoding  Count
Level

n              64,266
o                  27
```

Count of holdings records

This report counts the holdings records by record type.

```
================================================================================
18-DEC-00  11:47 AM                                                  PAGE    1
                          Count of Holding Records

================================================================================


Record Type                          Count

x                                   94,205
y                                    1,237
z                                      254
```

Bibliography of titles at location

This report lists the holdings for a particular location within the library system. The report is sorted by call number. It includes the item title, author, and publication date.

```
================================================================================
18-DEC-00  01:26 PM          Bibliography of Titles                    PAGE    1
                                       at
                                     WEST
================================================================================
```

Call Number	Title	Author	Pub Date
131.3 HILL	Think and grow rich.	Hill, Napoleon.	1937
551.7 GOULD	Time's arrow, time's cycle : myth a	Gould, Stephen	1987
583.24	Oranges.	McPhee, John.	1967
658.1/141 FO	402 things you must know before sta	Fox, Philip J.	1980
658.4 LOD	Feminine leadership, or, How to suc	Loden, Marilyn.	1985
658.5/75 HUS	That's a great idea / by Tony Husch	Husch, Tony, 19	1987
658/.00207 H	The Abilene paradox and other medit	Harvey, Jerry B	1988
917.8 042 .2	The way to the western sea : Lewis	Lavender, David	1988
978 .02	In the footsteps of Lewis and Clark	Snyder, Gerald	1970
EQ207 .R61	Wuthering heights.	Bronte, Emily.	1943
FIC ALLE	Eva Luna / by Isabel Allende ; tran	Allende, Isabel	1988
FIC ALLE	The house of the spirits / Isabel A	Allende, Isabel	1985
FIC ATW	Bluebeard's egg and other stories /	Atwood, Margare	1986
FIC ATW	The handmaid's tale / Margaret Atwo	Atwood, Margare	1986
FIC GARC	One hundred years of solitude. Tran	García Márquez,	1970
FIC GARC	Love in the time of cholera / Gabri	García Márquez,	1988
FIC LEE	To kill a mockingbird.	Lee, Harper.	1960
JUV 567.9 SA	Dinosaurs of North America / by Hel	Sattler, Helen	1981
JUV 818 BER	Why didn't the dinosaur cross the r	Bernstein, Joan	1990
JUV STER	Tyrannosaurus wrecks : a book of di	Sterne, Noelle.	1979
KF311 Z9 .M3	The terrible truth about lawyers :	McCormack, Mark	1987
ME609 .S41	Star trek III, the search for Spock	McIntyre, Vonda	1984
QE862.D5 H64	Digging dinosaurs / John R. Horner	Horner, John R.	1988

Count of titles by record type and bibliographic level

This report provides a count of unique MARC titles held by the library.

18-DEC-00 01:33 PM PAGE 2

Count of Titles by Record Type and Bibliographic Level

Rec Type	Bib Lvl	Bib Count
j	m	100
Total by Rec Type:		100
k	d	1
k	m	2
Total by Rec Type:		2
v		1
Total by Rec Type:		1
x		12
Total by Rec Type:		12
y		10
Total by Rec Type:		10
Grand Total:		73,427

Items added with count by location

This report lists all items added from a specified date to a library system sorted by location.

```
================================================================================
18-DEC-00  01:43 PM                                                    PAGE    1
                      Items Added with Count by Location

================================================================================

Inventory Location    Item Cnum  Item Category          Inventory Date

             NORTH       262164  Book                   11/30/2000
             NORTH       393222  Book                   11/28/2000
             NORTH       393223  Book                   11/28/2000

Location Total:                          3

              WEST       524310  Book                   11/22/2000

Location Total:                          1


Grand Total:                             4
```

Titles in a call number range

This report lists all titles in a specified call number range at a location to be used as a shelf list.

18-DEC-00 02:07 PM PAGE 1

Titles in a Call Number Range

Call Number	Author	Title	Pub Date
F350.3 .W48	Whipple, Dan.	The heartland : Missouri, Kansas, Nebras	1997
F394.G2 L37	Larson, Erik.	Isaac's storm : a man, a time, and the d	1999
F474.B79 E8	Eugene, Toni.	Branson with kids : the definitive famil	1996
F474.B79 S5	Shaffer, Carol A.	Branson's best day trips : a guide to di	2000
F474.I3 V47	Vernon, Laura.	Harry Truman slept here : a glimpse at t	1987
F591 .E45	Eide, Ingvard Henry,	American odyssey; the journey of Lewis a	1969
F592 .M742	Mountain men and the	Mountain men and fur traders of the Far	1982
F592.4 1988	Lewis, Meriwether, 1	Lewis and Clark in North Dakota / edited	1988
F592.4 2000	Lewis, Meriwether, 1	The essential Lewis and Clark / Landon Y	2000
F592.7 .A49	Ambrose, Stephen E.	Undaunted courage : Meriwether Lewis, Th	1996
F592.7 .B55	Blumberg, Rhoda.	The incredible journey of Lewis and Clar	1987
F592.7 .C87	Cutright, Paul Russe	Lewis and Clark, pioneering naturalists.	1969
F592.7 .F57	Fitz-Gerald, Christi	Meriwether Lewis and William Clark / by	1991
F592.7 .L38	Lavender, David Siev	The way to the western sea : Lewis and C	1988
F592.7 .S12	Salisbury, Albert P.	Lewis & Clark : the journey west, by Alb	1950
F592.7 .S12	Salisbury, Albert P.	Two captains west; an historical tour of	1950
F592.7 .S68	Snyder, Gerald S.	In the footsteps of Lewis and Clark, by	1970
F592.7 .S73	Stein, R. Conrad.	The story of the Lewis and Clark Expedit	1978
F592.7.S123	Brown, Marion Marsh.	Sacagawea : Indian interpreter to Lewis	1988
F592.7.S123	Jassem, Kate.	Sacajawea, wilderness guide / by Kate Ja	1979
F592.7.S123	Kessler, Donna J.	The making of Sacagawea : a Euro-America	1996
F598 .W54 1	Wilder, Laura Ingall	On the way home : the diary of a trip fr	1994
F636 .L92 1	Low, Ann Marie, 1912	Dust bowl diary / Ann Marie Low.	1984
F636 .R6 19	Robinson, Elwyn B.	History of North Dakota / by Elwyn B. Ro	1982
F636.3 .C3	Carpenter, Allan, 19	North Dakota / by Allan Carpenter.	1979
F636.3 .H47	Herguth, Margaret S.	America the beautiful. by Margaret S. He	1990
F868.M7 D46	Dennett, Diana J. (D	Tell me more ancestor stories, grandma!	1997

Total for this Location: 27

New titles report

This report lists all new titles entered since a specified date. The titles are sorted by database control number.

07-DEC-00 02:59 PM PAGE 1

New Titles Report

Rec Type	Rec Stat	Date Entered	Main Entry	Title CNUM	Author
a	c	20089071	Encyclopedia of Frui	01-AAA-3245	Wilkinson, Albe
a	c	20089071	Square foot gardenin	01-AAA-3261	Bartholomew, Me
a	c	20087041	March or die : a new	01-AAA-5249	Geraghty, Tony.
a	c	20079110	Laying waste : the p	01-AAA-5709	Brown, Michael
a	c	20089072	At Bertram's Hotel.	01-AAA-6684	Christie, Agath
a	c	20090010	Dickens and his work	01-AAB-0208	Burton, H. M.
a	c	20089072	Mathematics East and	01-AAC-0436	Linn, Charles F
a	c	20090020	A lost love.	01-AAD-4949	Mortimer, Carol
a	c	20081590	Little Lord Fauntler	01-AAE-6848	Burnett, France
a	c	20082061	The wind in the will	01-AAF-2167	Grahame, Kennet
a	n	20060129	Arctic patrols; stor	01-AAH-2782	Campbell, Willi
a	c	20000601	Shrub : the short bu	01-AAH-3122	Ivins, Molly.
a	c	20000711	Harry Potter and the	01-AAH-3178	Rowling, J. K.
a	n	20000508	J.K. Rowling : the w	01-AAH-3180	Shapiro, Marc,
a	c	20000616	The bear and the dra	01-AAH-3206	Clancy, Tom, 19
a	c	20000731	The business of hote	01-AAH-3255	Medlik, S.
e	n	20000608	Hudson's Twin City s	01-AAH-3342	Hudson Map Comp
a	c	20000607	The prince of Tennes	01-AAH-3382	Maraniss, David
a	n	20000517	Images of plague and	01-AAH-3386	Boeckl, Christi
a	n	20000731	Prodigal summer : a	01-AAH-3398	Kingsolver, Bar
a	n	20000919	Winter's heart / Rob	01-AAH-3410	Jordan, Robert,
a	c	20000711	Stone landmarks : Fl	01-AAH-3446	Jackson, Marie
a	n	20001122	Saxamaphone	01-AAH-3465	Simpson, Lisa
i	c	20000619	The self under siege	01-AAH-3474	Roderick, Rick.
i	n	20000606	From Plato to postmo	01-AAH-3475	Markos, Louis.
a	n	20000714	Retrieving experienc	01-AAH-3476	Kruks, Sonia.

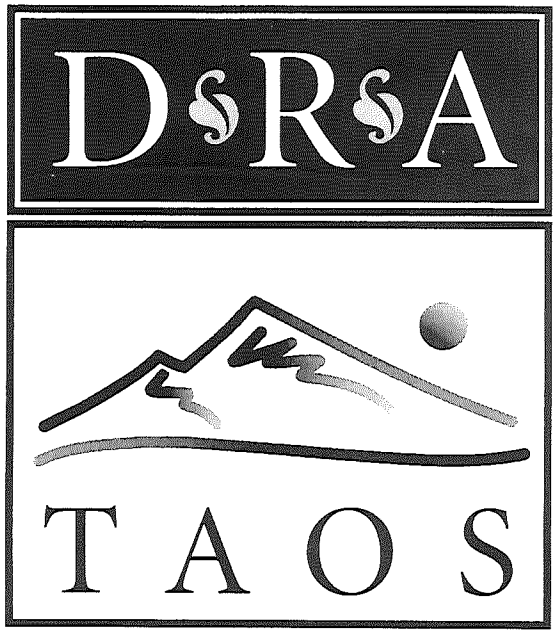
New titles in the collection

This report lists new bibliographic records added since a specified date.

18-DEC-00 02:28 PM PAGE 1

New Titles in the Collection

Title CNUM	Author	Title
01-AAH-3122	Ivins, Molly.	Shrub : the short but happy political li
01-AAH-3475	Markos, Louis.	From Plato to postmodernism understandin
01-AAH-3382	Maraniss, David.	The prince of Tennessee : the rise of Al
01-AAH-3342	Hudson Map Company.	Hudson's Twin City street atlas, 2000.
01-AAH-3206	Clancy, Tom, 1947-	The bear and the dragon / Tom Clancy.
01-AAH-3474	Roderick, Rick.	The self under siege philosophy in the t
01-AAH-3446	Jackson, Marie D.	Stone landmarks : Flagstaff's geology an
01-AAH-3178	Rowling, J. K.	Harry Potter and the goblet of fire / by
01-AAH-3476	Kruks, Sonia.	Retrieving experience : subjectivity and
01-AAH-3412		The Monterey Formation : from rocks to m
01-AAH-3398	Kingsolver, Barbara.	Prodigal summer : a novel / Barbara King
01-AAH-3255	Medlik, S.	The business of hotels / S. Medlik and H
01-AAH-3385		Beyond Isabella : secular women patrons
01-AAH-3410	Jordan, Robert, 1948	Winter's heart / Robert Jordan.
01-AAH-3465	Simpson, Lisa.	Saxamaphone.
01-AAH-2782	Campbell, William, 1	Arctic patrols; stories of the Royal Can
01-AAA-5709	Brown, Michael Harol	Laying waste : the poisoning of America
01-AAE-6336		Basic fly casting John Fabian Production
01-AAE-6848	Burnett, Frances Hod	Little Lord Fauntleroy / by Frances Hodg
01-AAF-2167	Grahame, Kenneth, 18	The wind in the willows / Kenneth Graham
01-AAA-5249	Geraghty, Tony.	March or die : a new history of the Fren
01-AAA-3261	Bartholomew, Mel.	Square foot gardening.
01-AAA-3245	Wilkinson, Albert E.	Encyclopedia of Fruits, Berries & Nuts :
01-AAA-6684	Christie, Agatha, 18	At Bertram's Hotel.
01-AAC-0436	Linn, Charles F.	Mathematics East and West.
01-AAB-0208	Burton, H. M.	Dickens and his works.
01-AAD-4949	Mortimer, Carole.	A lost love.



Money Reports

- List of patrons with fines
- Borrower fine report
- Total fines levied and outstanding

List of patrons with fines

This report produces a list of patrons and their outstanding fines. The amount of the original fines and any remaining balances are listed with the patron names.

11-DEC-00 04:51 PM PAGE 1

List of Patrons with Fines

Date	Item Barcode	Due Date	Amount	Balance Remaining
Johnson, Mary				
07/24/2000	0224701570471	08/07/2000	20.00	
07/24/2000	0224701570471	08/07/2000	4.00	4.00
	Totals:		24.00	4.00
KENNEDY, JOHN				
09/27/2000	0888800296251	09/05/2000	1.90	1.90
	Totals:		1.90	1.90
GRAHAM, DELORES				
02/04/2000	0224700214550	06/15/1999	10.00	10.00
02/04/2000	0224701145035	06/15/1999	10.00	10.00
02/04/2000	0224701397487	06/15/1999	10.00	10.00
	Totals:		30.00	30.00
ROBERSON, DONALD				
03/09/2000	0224701696946	12/31/1969	5.00	
03/09/2000	0224701656247	12/31/1969	6.95	6.95
	Totals:		11.95	6.95

Borrower fine report

This report produces a list of patrons and their outstanding fines. The amount of the original fines and any remaining balances are listed with the patron names. This report also lists the title and barcode of overdue items.

07-DEC-00 02:51 PM PAGE 10

BORROWER FINE REPORT

Item Barcode	Title	Due Date	Amount
KENNEDY, JOHN	03-AAA-0108		
0888800296251	The bear and the dragon /	09/05/2000	$1.90
Total Fines for this patron:			$1.90
MATHEWS, DAVID	03-AAA-0241		
0888800295469	Flight of the buffalo : soaring to excellence, lea	09/20/2000	$5.00
0888800295410	Check-in check-out /	09/27/2000	$10.00
Total Fines for this patron:			$15.00
MAXWELL, SALLY ANN	03-AAA-0198		
0888800126441	The telephone and telephone exchanges; their inven	12/31/1969	$30.00
0224701416188	The red room riddle; a ghost story.	12/31/1969	$20.00
0888800126292	Your home, your health & well being /	12/31/1998	$5.00
0888800126326	America in perspective : major trends in the Unite	06/23/1999	$10.00
0888800126284	The brain : the last frontier /	08/11/1999	$10.00
0888800126383	The distant summer /	08/25/1999	$10.00
0888800126417	The wealth of nations.	08/25/1999	$10.00
0888800126300	Ike's spies : Eisenhower and the espionage establi	10/25/1999	$5.00
0888800126318	Bioburst : the impact of modern biology on the aff	10/25/1999	$5.00
0888800126433	American government: National, State, local	05/10/2000	$10.00
0888800126441	The telephone and telephone exchanges; their inven	05/10/2000	$10.00
0888800295485	Think & grow rich /	09/20/2000	$5.80
Total Fines for this patron:			$130.80

Total fines levied and outstanding

This report calculates all fees and fines charged for a library system. The remaining balance of the unpaid fines is also calculated.

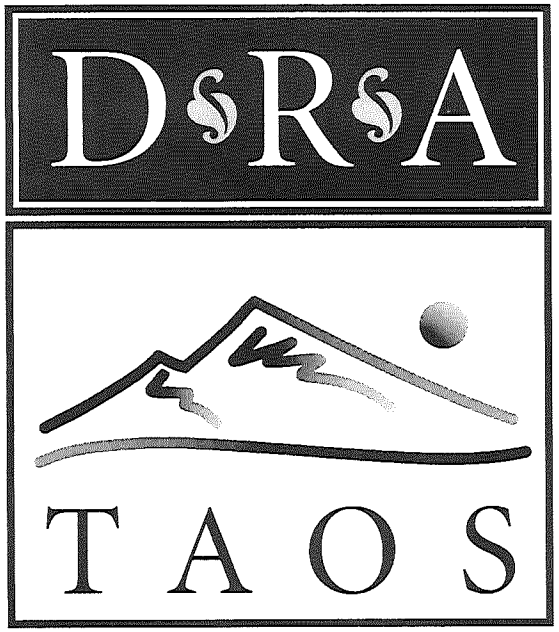
```
================================================================================
06-DEC-00  03:23 PM                                                  PAGE    1

                      Total Fines Levied and Outstanding

================================================================================


    Total Fines              Balance
    & Fees Charged           Remaining

         $2,526.82             $196.00
```



Labels

- Patron labels
- Patron labels by birthdate range
- Patron labels by zipcode

Patron labels

This report produces patron labels for a library system.

Mary Johnson
521 Elm
St. Louis, MO 63117

Mary C Wilson
23 Walnut St.
St. Louis, MO 62109

Katherine Jones
9182 Maple Apt 1
St. Louis, MO 63876

Mary Zebrowski
43 Rocking Horse
St. Louis, MO 62104

William Clark
7583 Walnut
St. Louis, MO 63411

Brenda G Thomas
6250 Nevada St.
St. Louis, MO 63046

Anne Holmes
2345 Ashe
St. Louis, MO 65765

Max S Brown
5300 Branch Ave.
St. Louis, MO 63421

Christine Kelly
4534 Oak
St. Louis, MO 65382

Robert M White
80 Oak St.
St. Louis, MO 63130

Joseph Mayfield
5656 Pine
St. Louis, MO 63421

Karen Rose
2100 May Ln.
St. Louis, MO 63108

Charlotte Harper
8734 Woodlawn
St. Louis, MO 63456

Jake Lanoch
1300 Bedford Ave.
St. Louis, MO 63105

Patron labels by birthdate range

This report produces labels for patrons who were born within a certain date range.

Mr. Jim D Bone Sr.
11 Lemon Tree
St. Louis, MO 63132

Mr. Albin C Buhrgers
901 Lovejoy
St. Louis, MO 63132

Ms Claire Chartrand
1425 Wauwatosa
St. Louis, MO 63117

Emil M Karol
638 Geoffrey Lane Apt B
St. Louis, MO 63132

Christine Kelly
4534 Oak
St. Louis, MO 65382

Mr. Brad Miller
1294 Crestwood Ct.
St. Louis, MO 63132

Mr Craig Miller
200 Elm Lane Apt. 3
St. Louis, MO 63132

Ms. Katherine Reeves
589 Library St.
St. Louis, MO 63105

Mr. Evan Sils
6625 Trinity, Apt 3W
St. Louis, MO 63130

John A Smith Jr.
111 1st St Apt 1
ST LOUIS, MO 63132

Paul Thomas
7423 Cedar
St. Louis, MO 63782

Donald E Roberson
5009 Nadine St.
St. Louis, MO 63103

Ms. Elizabeth Rice
1204 Salerno Ct.
St. Louis, MO 63046

David Moore
7154 Steffie Lane
St. Louis, MO 63041

Patron labels by zipcode

This report produces labels for all patrons in one zipcode.

John A Smith Jr.
111 1st St Apt 1
ST LOUIS, MO 63132

Dorothy Walton
4738 W. 7th St.
St. Louis, MO 63132

Steven Gustafson
3333 3rd St.
St. Louis, MO 63132

Michael Davis
999 9th St
St. Louis, MO 63132

Samuel Cooper
555 5th St
St. Louis, MO 63132

Dr. Joseph C Cipfl Jr.
38 Blanc Lee
St. Louis, MO 63132

Zach Taylor
801 West Smith
St. Louis, MO 63132

Emil M Karol
638 Geoffrey Lane Apt B
St. Louis, MO 63132

Mr. Albin C Buhrgers
901 Lovejoy
St. Louis, MO 63132

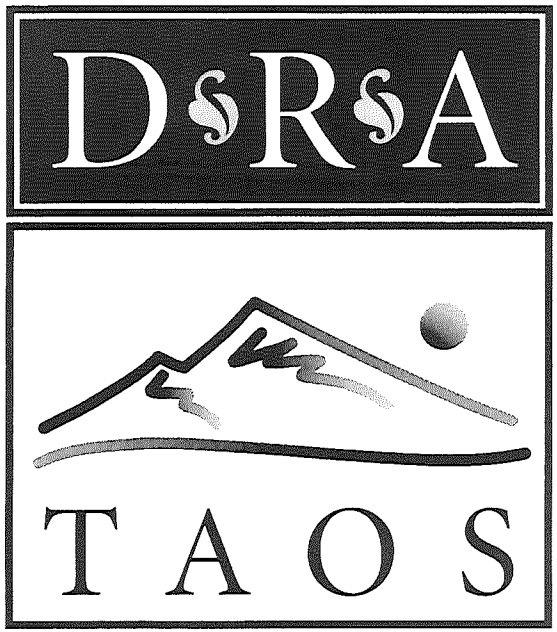
Mr. Jim D Bone Sr.
11 Lemon Tree
St. Louis, MO 63132

Ms. Cie E Hoffmann
5698 Living Street
St. Louis, MO 63132

Frank L Wright
638 Geoffrey Lane Apt B
St. Louis, MO 63132

Mr. Mathew R Roodhouse
1489 Laclede Ave.
St. Louis, MO 63132

Ms. Jane L Hopkins
510 Killarney
St. Louis, MO 63132



Notices

- List of available notices
- Notice format 8 1/2 x 11
- Notice format postcard
- Notice format self mailer

List of available notices

- **Fee/Fine** - Notifies a patron of current fees and fines owed to the library.
- **Final Bill** - Lists items with the status Assumed Lost and the associated charges. This notice is based on the Number of days an overdue item is considered lost policy and uses the Default lost fine policy for the item. If there is a price in the item record, the value will be printed on the notice. The processing fee is added to the finalbill notice. If you have specified in the policy file to add the processing fee for assumed lost items, it is printed on the notice. The notice attribute "Reason" is added to the finalbill notice type. This allows you to differentiate between the lost fine and the processing fee.
- **Overdue** - Notifies a patron of overdue items still checked out to the patron.
- **Recall** - Notifies a patron that an item checked out to the patron has been recalled for use elsewhere by the library.
- **Request Expired** - Notifies a patron that a request for an item by the patron expired before an item became available.
- **Request Hold** - Notifies a patron that a requested item is on hold and ready for pickup.
- **Hold Expired** - Notifies a patron that a requested item is no longer being held for the patron.
- **Recall Cancelled** - Notifies a patron, whose item was recalled, that the recall has been cancelled.

Notice format 8 1/2 x 11

Main Library
1276 North Warson Rd
St Louis MO 63132

11-29-1999
Phone: (123)456-7890
The item(s) that you requested is now available.
Please bring this notice with you when you pick up the material.

Call Number	Title	Req Date	Location	Exp Date
CJ787 .M97	Sleeping dogs lying.	11-17-99	DRA	12-01-99

Kitty Johnson
345 Wool St.
St. Louis, MO 63132

Main Library
1276 North Warson Rd
St Louis MO 63132

12-10-1999
Phone: (123)456-7890

Notice format postcard

```
  Main Library                          |
  1276 North Warson Rd                  |
  St Louis MO 63132                     |
                                        |
11-16-1999                              |
                                        |John Jones
1000100027266                           |1730 Chancellor
The following titles are overdue.       |San Diego
Call Number: WM745 .F10                 |CA 92109
Title: Parton's Island.                 |
Due Date: 11-02-99                      |
Location: DRA                           |
                                        |

  Main Library                          |
  1276 North Warson Rd                  |
  St Louis MO 63132                     |
                                        |
11-16-1999                              |
                                        |Fred Smith
1888800229459                           |425 S.W. Oak Lane
The following titles are overdue.       |St. Louis
Call Number: VA570 .V35                 |MO 63132
Title: Who knows Julie Gordon? /        |
Due Date: 11-02-99                      |
Location: DRA                           |
                                        |
Call Number: HK20 .H54                  |
Title: The press lord /                 |
Due Date: 11-02-99                      |
Location: DRA                           |
                                        |
Call Number: AV64 .S60                  |
Title: Sowannee Valley /                |
Due Date: 11-02-99                      |
Location: DRA                           |
                                        |
```

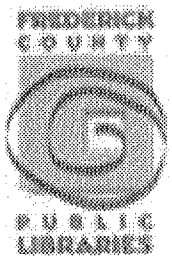
Notice format self mailer

Main Library
1276 North Warson Rd
St Louis MO 63132

11-08-1999
Phone: (123)456-7890
You are being billed for the following item(s).
Library privileges will be restricted until these fines are paid.

Call Number	Title	Due Date	Location	Amount
XX42 .T83	Another country.	09-16-99	DRA	20.00
Total amount:				20.00

Eugene Johnson
34598 Skyview
St. Louis, MO 63132



Response To

Request For Proposal

RFP #01-77, (#0000000275) Library Automation Software

Frederick County Public Libraries

For An

Integrated Client/Server Library System

4.5
Taos References – Public Libraries

July 12, 2001

Taos References – Public Libraries

Arcadia Public Library
Mr. Kent Ross, Director
20 W. Duarte Road
Arcadia, California 91006
626-821-5568
Fax: 626-447-8050
Email: Kross@ciarcadia.ca.us
50 Users
Windows NT
Taos Cataloging, Taos Circulation, Web2 OPAC
Migrated from DRA Inlex, 5/2001

Chesapeake Public Library System
Ms. Margaret P. Stillman, Director of Libraries and Research Services
City of Chesapeake
298 Cedar Road
Chesapeake, Virginia 23322-5598
757-412-0490
Fax: 757-382-6206
Email: mstillman@chesapeake.lib.va.us
180 Users
Windows NT
Taos Cataloging, Taos Circulation, Web2 OPAC
Converted from VTLS 9/00

El Dorado Public Library
Ms. Jeanne Amos, Director
345 Fair Lane
Placerville, California 95667
916-621-5546
Fax: 916-622-3911
Email: lib-pl@eldoradolibrary.org
70 Users
Windows NT
Taos Cataloging, Taos Circulation, Web2 OPAC
Migrated from DRA Inlex 1/00

Eustis Public Library
Mr. E. Steven Benetz, Director of Human Services/Library
120 N. Center Street
Eustis, Florida 32726-3512
352-357-5686
Fax: 352-357-5450
Email: Library@eustis.org
25 Users
Windows NT
Taos Cataloging, Taos Circulation, Web2 OPAC
Converted from Gaylord Galaxy 8/00

Logan Public Library
Mr. Ronald Jenkins, Director
255 N. Main Street
Logan, Utah 84321-3914
435-750-9860
Fax: 435-753-5026
Email: rjenkins@loganutah.org
30 Users
Windows NT
Taos Cataloging, Taos Circulation, Web2 OPAC
Migrated from DRA Inlex 10/00

Michigan City Public Library
Mr. Andy Smith, Acting Assistant Director
100 East 4th Street
Michigan City, Indiana 46360
219-873-3056
Fax: 219-873-3067
Email: awsmith@mclib.org
50 Users
Windows NT
Taos Cataloging, Taos Circulation, Web2 OPAC
Converted from GEAC 11/99

North Star Borough Public Library
Mr. Gregg Hill, Library Director
1215 Cowles Street
Fairbanks, Alaska 99701
907-459-1020
Fax: 907-459-1024
Email: library@fnsb.lib.ak.us
160 Users
Sun Solaris
Taos Cataloging, Taos Circulation, Web2 OPAC
Converted from VTLS 10/99

Torrance Public Library
Mr. Norman Reeder, Library Services Manager
3301 Torrance Blvd.
Torrance, California 90503
310-618-5968
Fax: 310-320-3421
Email: nreeder@library.ci.torrance.ca.us
130 Users
Windows NT
Taos Cataloging, Taos Circulation, Web2 OPAC
Migrated from DRA Classic 1/01

Virginia Beach Department of Public Libraries
Virginia Beach Public Library
Ms. Martha Sims, Director
Municipal Center - Building 19, 2nd Floor
2416 Courthouse Drive
Virginia Beach, Virginia 23456-9068
757-427-4321
Fax: 757-427-4220
Email: msims@virginia-beach.va.us/dept/library/
240 Users
Windows NT
Taos Cataloging, Taos Circulation, Web2 OPAC
Converted from VTLS 12/00

Woodstock Public Library
Mr. Stephen Nelson, Chief Librarian
445 Hunter Street
Woodstock, Ontario N4S 4G7
Canada
519-539-4801
Fax: 519-539-5246
Email: sjnelson@ocl.net
30 Users
Windows NT
Taos Cataloging, Taos Circulation, Web2 OPAC
Migrated from DRA Inlex 12/99

DRA TAOS

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FOR THE NEXT-GENERATION

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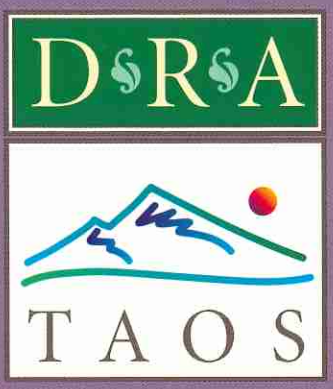
DRA

TAOS



Flexible. Functional. Easy to use. These were the design mandates DRA used to create Taos, the powerful next-generation system for automating today's libraries. Although Taos takes full advantage of the most sophisticated technology to deliver a system rich in features and adaptable in workflow, library automation should ideally be focused on the business of libraries. And at DRA, the business of libraries is our core business. This is why Taos was specifically designed for libraries — by librarians.

This is the Taos advantage.

DRA TAOS

advantages

Powerful Online Public Access Catalog (OPAC)

Combining extensive search and display capabilities, with the ability to customize the entire interface, DRA Web2 has become the OPAC of choice for even non-DRA libraries. Web2's broadcast searching and data merging ability provides resource sharing that allows patrons complete access to worldwide resources.

GUI Interface

Using standard Windows conventions, the Taos interface is easily familiar for library staff. Taos lets you customize what data displays by choosing information appropriate to individual workflows. Like all Windows applications both the keyboard and mouse may be used to input data easily.

Digital Content

Taos seamlessly connects your users with digital resources and allows libraries to manage multiple digital and printed collections within a single integrated system.

Flexible System Architecture

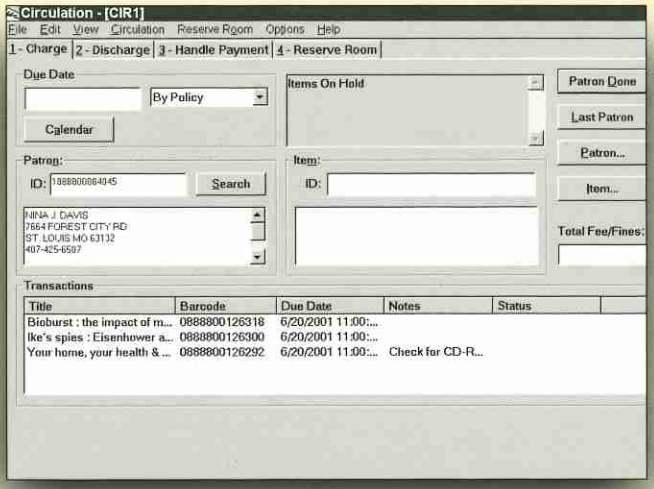
By separating interface workflow and appearance from the library's administrative operation, the client/server architecture behind Taos ensures that local clients conform to the global policies set by the library.

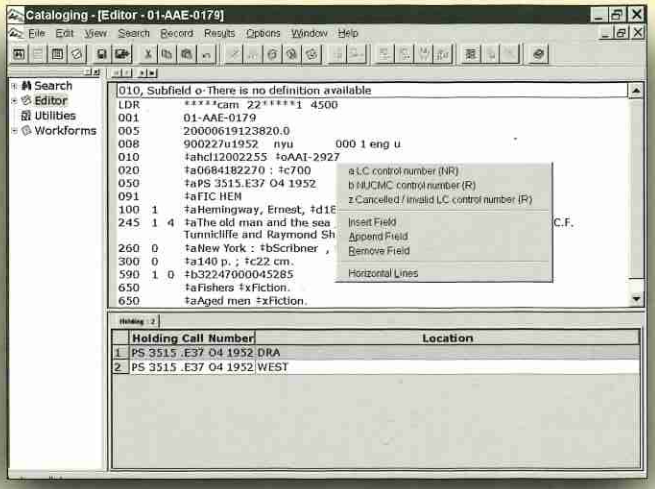
State-of-the-Art Standards

Taos runs on a variety of operating systems and is backed by the Common Object Request Broker Architecture (CORBA). CORBA optimizes the library's hardware by permitting all network computing power to serve both client and server functions, wherever it makes the most sense given system resources.

Object-Oriented Design

The object-oriented architecture of Taos is optimized for native storage of both MARC-based and non-MARC data, extensive indexing capabilities, and easy system maintenance.




Cataloging - [Editor - 01-AAE-0179]
File Edit View Search Record Results Options Window Help
Search
Editor
Utilities
Workforms
010, Subfield o-There is no definition available
LDR *****cam 22*****1 4500
001 01-AAE-0179
005 20000619123820.0
008 900227u1952 nyu 000 1 eng u
010 ǂahcl12002255 ǂoAAI-2927
020 ǂa0684182270 : ǂc700
050 ǂaPS 3515.E37 O4 1952
091 ǂaFIC HEM
100 1 ǂaHemingway, Ernest, ǂd1E
245 1 4 ǂaThe old man and the sea
Tunnicliffe and Raymond Sh
260 0 ǂaNew York : ǂbScribner ,
300 0 ǂa140 p. ; ǂc22 cm.
590 1 0 ǂb32247000045285
650 ǂaFishers ǂxFiction.
650 ǂaAged men ǂxFiction.
a LC control number (NR)
b NUCMC control number (R)
z Cancelled / invalid LC control number (R)
Insert Field
Append Field
Remove Field
Horizontal Lines
Holding - 2
Holding Call Number
Location
1 PS 3515 .E37 O4 1952 DRA
2 PS 3515 .E37 O4 1952 WEST

Taos Circulation

Taos Circulation streamlines a circulation desk's high-volume workflow. Designed for rapid processing of high volume transactions, Taos helps libraries eliminate long check-out lines. In addition, Taos does not force the user to cycle through screens of windows to accomplish basic circulation tasks. Comprehensive patron and item information, when needed, is accessed by a single button.

Taos Circulation lets staff customize and print the results for lists such as outstanding patron requests and check outs. Complementing this and other types of local customization, Taos allows for circulation parameters to be standardized, ensuring that local clients, no matter how customized, conform to library borrowing policies.

Additional benefits include:

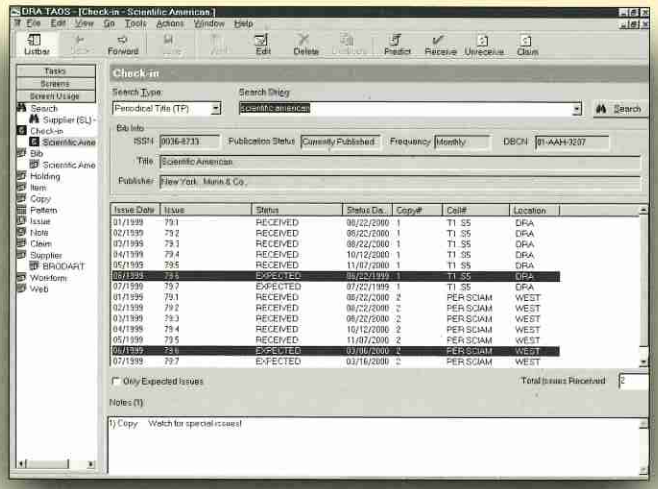
- Site-customized, searchable patron fields mapped to a patron record.
- Real-time patron request processing, including two recall levels with varying policy and fine structures.
- Ability to set different locations for request filling, and block closed locations.
- Support for mail, phone, and email notices regarding holds, fines, and renewals.
- Full-featured Reserve Room capabilities allow for searching of records by a variety of fields and circulation of items under different borrowing policies.

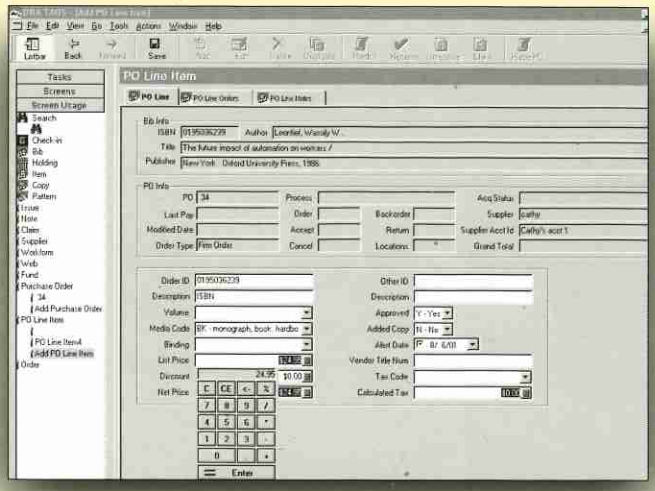
Taos Cataloging

Taos Cataloging efficiently manages a library's data. Side-by-side editing provides easy visual comparison of MARC records to enhance workflow. Full screen editing allows the flexibility to modify specific fields and easily reference additional open records. Real-time, transparent copy cataloging based on the Z39.50 protocol allows quick record downloads from OCLC or other bibliographic sources.

Additional benefits include:

- Scripting capabilities to enhance the rapid addition of items.
- Print and preview book or spine label capabilities through a sophisticated Label Designer pulling information from MARC records or free text.
- Easy transfer of multiple items between holdings records and/or multiple holdings records between bibliographic records across database locations.
- Sophisticated help features that include an alternative labeled display for easy editing of fixed fields and pull-down menus of valid MARC21 values for each position in a MARC record.
- Customizable Hitlist display to enhance sorting, resizing, and ordering of results.





Taos Serials

Taos Serials provides tracking and audit functionality for the effective management of a library's periodicals. It allows for tailoring serials operations for a library's unique policies — whether this entails centralized processing of all issues by a main location, or a completely decentralized check-in process at branch locations. Complex copy and pattern information help you accurately predict future issues and claim issues that fail to arrive on time.

Additional benefits include:

- Seamless interface with MARC records for automatic updating of holdings records.
- Activity navigator window and customized search menus for easy management of high volume transactions.
- A handy unreceive feature for issues mistakenly received.
- Incorporation of relevant cataloging and acquisitions features at appropriate places within the interface.

Taos Acquisitions

Taos Acquisitions delivers high performance through the streamlined ordering of library materials. By storing records in a MARC-like format, Taos Acquisitions provides extensive indexing capabilities for easy retrieval of supplier information and fund records. Users can initiate both simple and advanced OPAC searches from Acquisitions screens using features such as keyword access to data.

Taos simplifies the management of complex fund hierarchies: large purchase orders with many lines can encumber a single general fund, or the price of an individual line item can be divided among multiple funds. By assigning line items "identities," Taos Acquisitions locates orders through multiple access points such as title, PO or invoice number, date, supplier, funds, etc. A currency exchange feature provides foreign vendor price conversions.

Additional benefits include:

- Audit trail searching for all fund transactions.
- Selection lists for collaborative ordering among authorized staff.
- Ability to split an expenditure across many funds or add and transfer amounts within a fund.
- Access to fund and vendor files through name entry.
- GUI calculating within monetary fields of a purchase order.

DRA Web2

DRA Web2 represents the industry standard for Web-based online public access to a library's catalog and information resources. This powerful OPAC allows libraries to implement multiple interfaces while ensuring that all policies remain enforced.

DRA Web2 gives your users sophisticated search capabilities. Web2's unique user-friendly searching delivers comprehensive record result sets containing all terms in a query — whether the terms sit apart or side-by-side. Drawing on the Z39.50 protocol, Web2 performs simultaneous, transparent searching of multiple bibliographic databases with subsequent merging and sorting of results. Patrons can further focus search results through a full suite of search limiting options.

Web2 patrons benefit from many self-service, home-based computer options. For example, an individual user may request titles, specifying an exact item when multiple items are available, renew items already on loan, view and edit patron information, submit suggestions to library staff, and view information about the library.

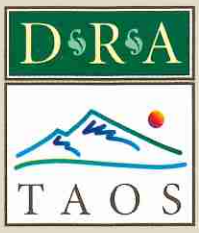
Additional benefits include:

- Direct access to a library's digital content based on the Uniform Resource Locator (URL) stored in a MARC record.
- Support for the display of multiple digital formats such as .gif, .jpeg, .au, .wav, mp2, mp3, .ps, .pdf, real audio, and real video files.
- Multiple data format displays such as thumbnails, medium-sized images, and full-sized pictures.
- Presentation of online book reviews and covers in search results.
- Ability to search any non-DRA system supporting a Z39.50 server.

DRA is the industry leader in the implementation of library and information technology standards. As a proactive member of the standards community, DRA helped to create and implement defining technologies such as MARC21, Z39.50, EDI, and XML. This commitment to standards enables DRA to develop products with new advances promptly.

DRA has never lost sight of the fact that its customers are in the business of libraries, not technology. DRA provides a full spectrum of services designed to help libraries meet their individual automation goals. DRA's commitment to service includes 24/7/365 expert assistance, continuous system monitoring, a comprehensive online customer Web site, standard-setting networking services, and guaranteed "no down time" migration.

To learn more about how DRA's vision, leadership, stability, and commitment can advance your library to new levels of excellence in service and connectivity, please view our Web site at www.DRA.com. You can contact us online at sales@dra.com or call 314 432-1100 or toll free 800 325-0888 (US/Canada).



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Data Research Associates

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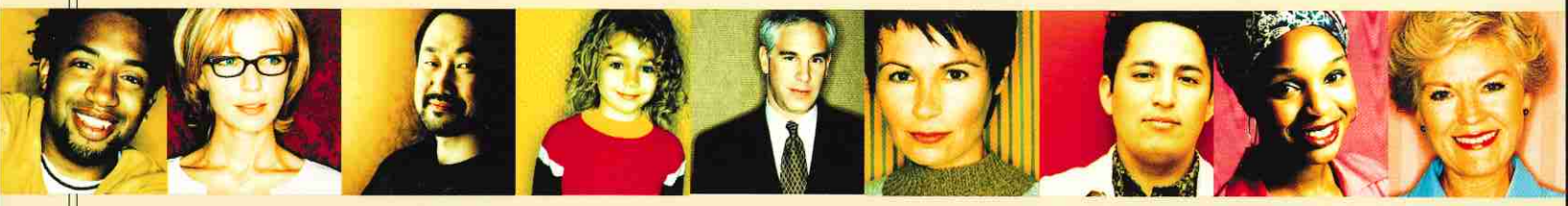


BUILDING A DIGITAL LIBRARY WITH DRA

THROUGH DRA'S COMMITMENT TO STANDARDS, TECHNOLOGY, AND SERVICE, THE PROCESS OF BECOMING A DIGITAL LIBRARY CAN BE EASY.

As technology moves toward the next phase of information management, global resource sharing, and electronic services, DRA stands at the forefront — achieving the realities of a digital vision.

Since the early beginnings of document automation, DRA has been a critical partner in helping libraries obtain the greatest benefits from the most current technologies.

DRA provides all necessary tools to assist libraries in maximizing digital technology.

The result: as patrons enjoy greater access to information, library collections are essentially redefined. By incorporating digital technology, a library can provide a wide range of enhancements that include:

Information delivery from remote locations by using state-of-the-art networking and wireless technologies.
Dynamic formats such as audio and video.
Powerful and easy access to information through quality interfaces and search capabilities.

DRA

The four pillars of a dig

1 Web2
Delivering the digital world

As a resource portal both inside and outside a library, the Web2 OPAC is the conduit between patrons and digital materials.

The versatility of Web2 allows for a variety of digital deliveries:

- Pictures, real-time audio and video, and full-text articles direct to a patron's desktop.
- Non-Romanized character sets such as Chinese, Japanese, and Korean, using the Unicode standard.
- Powerful broadcast searching for seamless access to Web-based materials and other Z39.50 compliant resources.
- Cohesive search results, using dynamic de-duplication and merging capabilities.

2 Taos
The framework for success

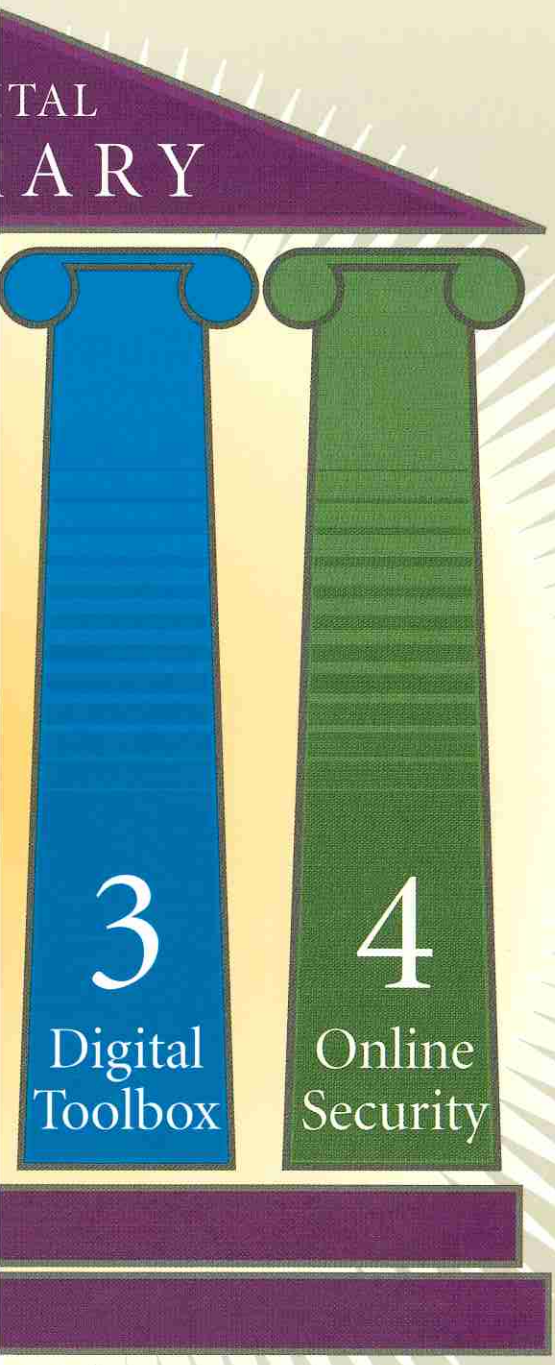
The DRA Taos system is designed to obtain the greatest efficiency from a library's Web server, whether it is storing images, sounds, or documents. By paring MARC records with a library's image server or Web page, Taos provides full support for the Web-based management of digital resources. With Taos, a library can manage its collections according to workflow needs. Taos also has the flexibility to implement a single MARC database for digital and traditional collections, or rely on multiple storage options. It even provides for multiple bibliographic databases serving one common patron database.

The Taos system provides:

- Digital content direct access through a Uniform Resource Locator (URL) stored in the 856 field of a MARC record.
- Display of online book jackets, tables of contents, and reviews.
- Web site access by way of a library's bibliographic database, bypassing confusing Internet search engines.
- URL location tracking and maintenance through DRA's Safari Report Writer product.

When libraries took the first ste
them build a new framework. No
the tools a library needs to enter t
management, global resourc

gital library from DRA:



toward automation, DRA helped as it was then, DRA is ready with next phase of network information sharing, and digital services.

3 | Digital Toolbox
eBook empowerment

DRA's partnership with netLibrary,® the leading provider of eBooks, allows a library to draw upon the unabridged content of more than 25,000 eBook titles. In addition, patrons can check out eBooks any time, from any location, using a standard Internet connection.

The DRA-netLibrary partnership ensures easy eBook collection processing. Library staff can quickly review and select titles through a file of MARC records posted on the netLibrary FTP server, then upload the new records into the library's database. Taos Acquisitions further streamlines the process through electronic purchase orders and tracking of all eBook purchases.

When searching for eBooks, patrons have the full power of the Web2 OPAC. This allows them to preview and check out eBooks to a home computer while existing library policies remain properly enforced.

netLibrary's built-in safeguards relieve library staff from the complexities of managing digital copyright issues. netLibrary also provides all necessary circulation statistics to assist librarians with collection development.

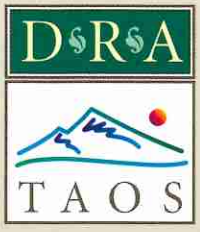
4 | Online Security
Protecting privacy

DRA Patron Authentication provides libraries with the balance of easy online patron service and the appropriate security for restricted resources. Based on the XML standard, DRA Patron Authentication allows remote, third party systems to query information housed in a library's patron database for specific authentication purposes.

Benefits of DRA Patron Authentication include:

- Patron privacy protection via highly configurable response files.
- Sophisticated functionality that indicates when a patron cannot be located or when a query is improperly formatted.
- Universality of the XML standard allowing a remote database to request patron authentication services from any library running the DRA authentication server.

To learn more about how DRA's vision, leadership, stability, and commitment can advance your library to new levels of excellence in service and connectivity, please view our Web site at www.DRA.com. You can contact us online at sales@dra.com or call 314 432-1100 or toll free 800 325-0888 (US/Canada).



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DRA ASPen

WITH DRA ASPen, HAVING A FIRST-CLASS LIBRARY AUTOMATION SYSTEM HAS NEVER BEEN EASIER

ASPen is the answer to your library's need for a cost-effective library automation system that doesn't sacrifice performance, flexibility, or service.

ASPen delivers the power of the Taos system directly to your library using your existing Internet connection. This premier-hosted application service arrives straight at your desktop without the need for any server hardware or system maintenance on your part.

ASPen frees your library from the demands of purchasing, supporting, and upgrading your own automation system. This means your staff can focus fully on patron services and other core concerns.

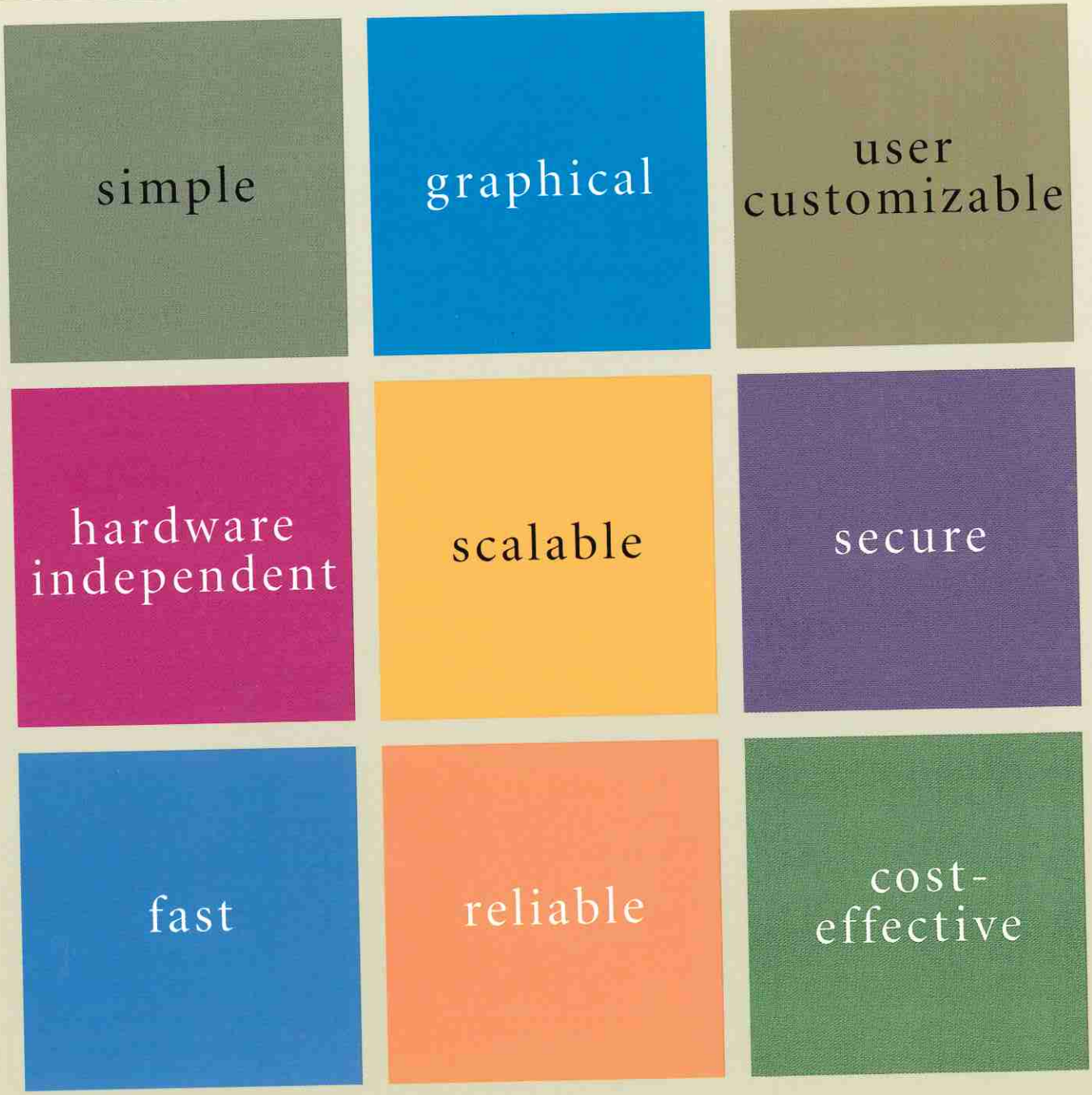
With ASPen, all you need to manage every aspect of your library with unprecedented speed, security, and simplicity is a Web browser.

DRA

ASPen

your library

DEMANDS AN AUTOMATION SOLUTION THAT IS:



ASPen

GIVES YOUR LIBRARY AN AUTOMATION SYSTEM THAT IS:

simple
So simple we can have most libraries up and running within 60 days. Drawing on DRA's more than 20 years of conversion and training expertise, it's second nature to us and simple for your library.

graphical
So graphical you can run your library with the click of a mouse. Yet, should you prefer, ASPen handles keyboards too.

user customizable
So customizable your staff can create any number of workflows to suit their individual preferences.

hardware independent
So independent your library may implement a Taos desktop on an existing workstation, whether it's running Macintosh, Windows, or Unix.

scalable
So scalable you can jump from serving 20 simultaneous users today to 30 users tomorrow with a simple email.

secure
So secure your library's data is protected by encryption, firewalls, VPNs, SSL licensing and, of course, your password.

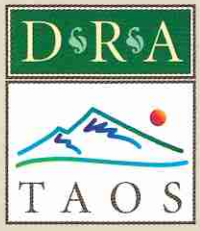
fast
So fast that ASPen performs 10,000 transactions per day without breaking a sweat.

reliable
So reliable we guarantee a 99% application up time.

cost-effective
So cost-effective you'll be pleasantly surprised. We'd be happy to provide you with a free on-line demonstration and a quote.

ASPen is the ASP solution you'd expect from a leading library automation company...that also happens to be a leading Internet service provider.

For more information on what DRA and ASPen can do for your library, please view our Web site at www.DRA.com. You can contact us online at sales@dra.com or call 314 432-1100 or toll free 800 325-0888 (US/Canada).



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DRA Web2

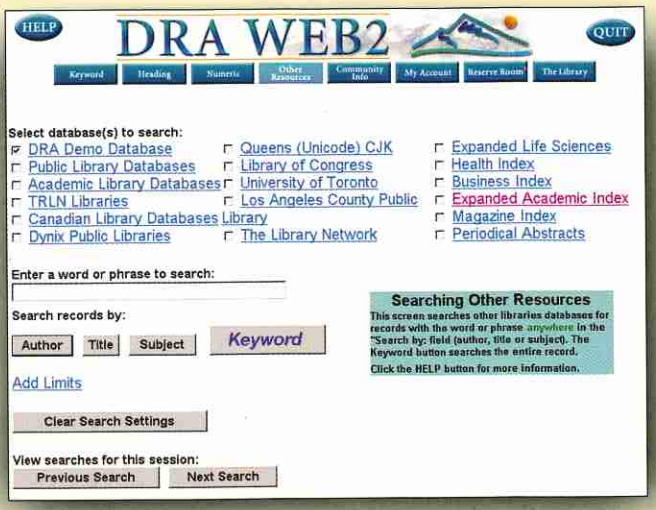
When you think of OPAC, think Web2. Fully functional, Web-based, setting the benchmark for all OPACs. Web2 is the ultimate; it's versatile, adaptable, and unique. Web2, designed with everyone in mind.

DRA

As a highly effective, fully functional Web-based Online Public Access Catalog (OPAC), DRA Web2 sets the benchmark for all OPACs.

Web2 allows simultaneous, transparent searches of multiple bibliographic databases with subsequent merging and sorting of result sets. Its unique user-friendly searching delivers comprehensive result sets of records containing all the terms in a query — whether the terms sit apart or adjacent. Plus, this standards-setting OPAC includes a full suite of search limiting options that strategically focus the user's search results.

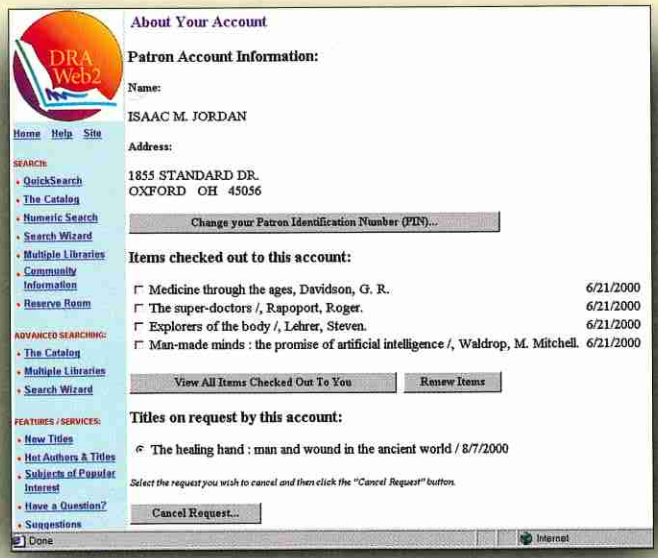
Web2 provides many additional self-service options, allowing searchers to request titles, specifying an exact item when multiple items are available, renew items already on loan, view and/or edit patron information, submit suggestions to library staff, and view information about the library.



Web2 offers users a choice of search functions. The Web2 advanced search, shown here, allows users to search multiple databases simultaneously. In the Web2 easy search, users simply select criteria. Whichever search option is chosen, Web2 automatically saves previous searches during a single session for users' reference.

sensible

To accommodate library policy, Web2 offers both registered patron and guest access. Registered patron access can be established through the use of a library card number. For extra security, a library can also assign a patron identification number (PIN). While guests may be limited to basic functionality, patrons may place their own requests, review and renew checked-out material, view fines or fees, submit suggestions, and if permitted by the library, modify their own PINs. Further, the library can control the number of guest sessions versus sessions for registered patrons, ensuring that registered patrons receive resource preference.



The Patron Account screen displays contact information and an overview of all current patron activities, while allowing the patron to modify the information and activities presented.

adaptable

Web2 functionality complements a range of library environments, as Web2 can be integrated into any system that supports a Z39.50 server, both DRA and non-DRA. Web2 has been successfully installed as the OPAC for libraries using DRA Classic, Taos, MultiLIS, Inlex/3000, Dynix, and Winnebago, among others.

Because of its inherent adaptability, different libraries can implement Web2 so that it best fits their varying needs. Virtually any commercially available or freeware Web browser can access Web2, which means that almost any workstation or terminal can present the OPAC.

versatile

Specialized DRA Web2 commands and macros embedded in the HTML — the language of Web sites — manage much of Web2's behavior. By combining the structural versatility of HTML with the agility of Web2's core functionality, DRA has created an OPAC of unparalleled flexibility in the library automation industry.

Search single and multiple databases with the multilingual capabilities of Web2. Users have the option of viewing the Romanized display of the search results with a single click of a button.

Web2's flexibility permits access to any field in the MARC record and allows library staff to specify the display of information. A library can define as many different user interfaces as desired — a child version, an adult version, a version for patrons with disabilities, even a staff version. Each of these interfaces can then accommodate the user's preference for English, French, or Spanish. More globally, Web2 supports interface variations across numerous libraries sharing the same software package. To accomplish this, the library requires only a single copy of the Web2 server software.

In addition, a library can install the software and use Web2 "out of the box" without changes. Web2 can also be taken "outside the box" and its interface modified to a library's preference. Effects can be changed from simple adjustments to graphics and text, to a complete refitting of how the program presents data and options to the end user — all without modifying the underlying program.

multilingual

Web2's versatility extends beyond the presentation of graphics and Romanized text. By supporting the Unicode Standard, DRA gives each library the ability to display non-Romanized character sets such as Chinese, Japanese, and Korean.

Regardless of whether the searcher uses Web2 from inside or outside the physical walls of a library, Web2 allows users to easily navigate a single library or a multitude of libraries' catalogs in order to produce a coherent result set. DRA Web2 enhances both the patron's and library staff's use of the OPAC by making it easy to navigate. For a demonstration, visit our Web page at www.DRA.com.

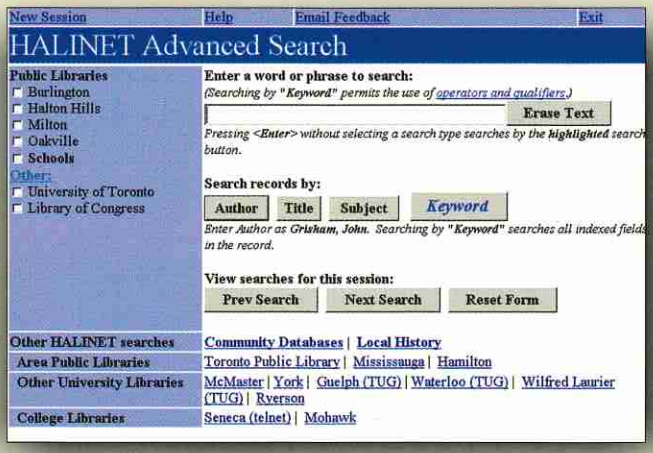
Completely customizable, a single copy of Web2 allows a library to set up different versions of Web2, such as this sample community portal interface.

CASE STUDY:

Web2 as a virtual union catalog

The Web2 implementation at HALINET exemplifies how DRA's sharp focus on standards has made Web2 a powerful tool for library resource sharing.

HALINET, a consortium in southern Ontario, Canada, is a diverse alliance representing seven information providers within the Regional Municipality of Halton: Burlington Public Library, Halton District School Board, Halton Roman Catholic School Board, Halton Hills Public Library, Milton Public Library, Oakville Public Library, and Sheridan College. The consortium as a whole uses primarily the epixtech Dynix product as its back-end system, although individual members also use DRA Classic, Dynix, or Winnebago.



The look is completely different from the DRA Web2 default interface, but the same capabilities are present.

HALINET selected Web2 as its Online Public Access Catalog (OPAC) because of DRA's in-depth implementation of standards. Specificially, Web2's ability to simultaneously and transparently search multiple databases, and then merge the results. This is especially appealing in situations where multiple vendors' systems are being searched.

Brian Bell, Manager of Support Services, Oakville Public Library, said, "The multi-site capabilities are wonderful. People can do the merged hit list and sort the results in different ways. All those capabilities people find really marvelous to use."

Walter Lewis, Deputy Chief Librarian, Halton Hills Public Library, was impressed with this feature. "We were looking for a gateway that would take us beyond bibliographical databases. And we were looking for something that would prove out Z39.50," he said.

HALINET finds the DRA Web2 OPAC appealing on many other levels. According to Lewis, "One of the major attractions of Web2, as far as we were concerned, was the fact that the final presentation of information is under our control. We can make the OPAC look the way we want it to look. And if we want to make a change tomorrow, we can make that change. DRA doesn't have to get involved in the process."

In addressing the actual search for an OPAC, Bell said, "Our ability to have complete control over the look and feel and what the links were going to be was very important. We were also able to make it look like our page, not like a vendor's idea of what it should look like. Some vendors were less open to that. They say, 'Here it is out of the box, you get these options and that's it. Take it or leave it.' To the extent that we have 100% control with Web2, the project is a complete success."

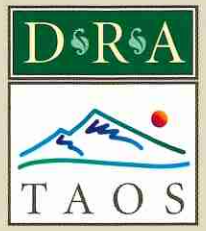
HALINET and DRA came into their partnership with divergent backgrounds — HALINET from the prospective of being a consortium of epixtech and other vendor sites and DRA accustomed to dealing with only DRA customers. DRA service, however, bridged the gap. In addressing the needs of HALINET, a satisfied Bell concluded, "We found DRA very responsive."

"The multi-site capabilities are wonderful. People can do the merged hit list and sort the results in different ways. All those capabilities people find really marvelous to use."

BRIAN BELL, *Manager of Support Services, Oakville Public Library, HALINET Consortium*

Web2 is simply the OPAC of choice, even for non-DRA libraries. With the ability to customize the search interface to suit a variety of user groups, Web2 easily becomes an OPAC for children, new users, expert searchers, and reference staff — each interface delivering the same searching capabilities in the display format best suited to the library user.

To learn more about how DRA's vision, leadership, stability, and commitment can advance your library to new levels of excellence in service and connectivity, please view our Web site at www.DRA.com. You can contact us online at sales@dra.com or call 314 432-1100 or toll free 800 325-0888 (US/Canada).



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THE DRA TAOS MODULES:

serials

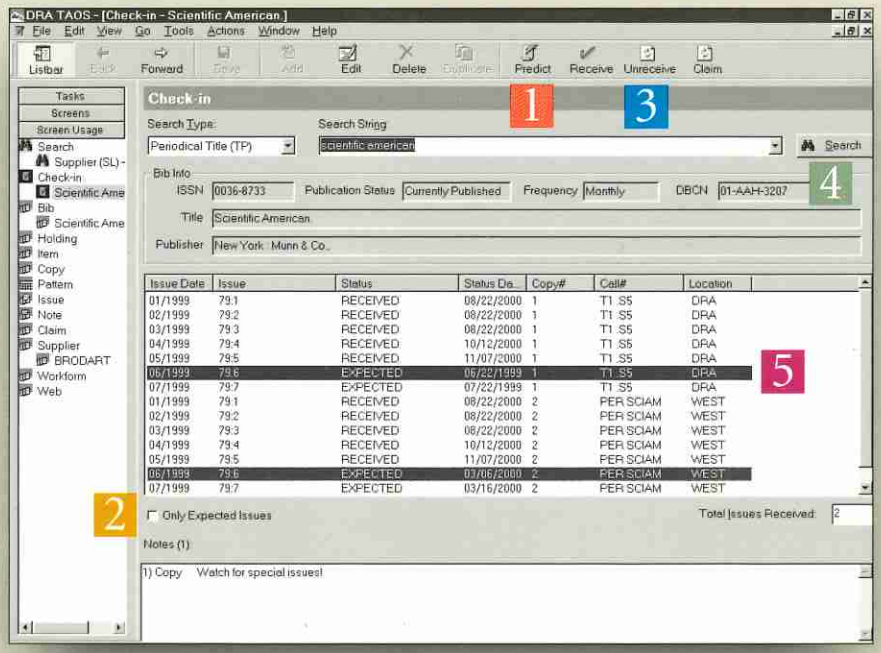
Taos Serials easily lets a library track the many details of the serials desk while effortlessly managing the high volume associated with receiving periodicals, standing orders, and continuations. Smooth prediction of complex publishing patterns ensures the easy processing of all periodicals, whether irregular or routine. The advanced development techniques used in Taos Serials makes customization a simple reality, without complex lengthy tasks. For example, a library can choose to process issues at a central location, at a local branch, or at the department level.

Future development plans include support for the Z39.76 standard for binding. Based on the publication's frequency and locally-defined bindery tags, Taos Serials will predict binding automatically upon check-in and will notify staff when the appropriate number of issues for binding have been received.

For more information on how DRA's Taos Serials can bring your library operations to new levels of excellence, please contact the DRA Sales Department at sales@dra.com or call toll free 800 325-0888 US/Canada.

1 A useful prediction feature streamlines the creation of the necessary caption and enumeration data for even the most complex serial titles. Any authorized user can override set pattern parameters to add an unexpected issue, combine issues, or change enumeration and chronology information for an issue.

2 Select "Only Expected Issues" to limit the issue display to issues that have yet to be received. This feature is particularly helpful for a site handling a large quantity of periodicals, such as a multi-branch library with centralized check-in.



Making the complex simple. *Taos Serials streamlines the labor-intensive task of check-in by simultaneously processing multiple copies of the same issue, or different copies within a range of issues. When an issue is received, holdings and summary holdings records are automatically updated, and an updated online receipt history will display in DRA Web2, the Taos OPAC.*

3 A handy "Unreceive" feature will undo any number of check-ins in case you accidentally process the wrong issue.

4 Taos Serials performs both simple and advanced searches that include wildcard, Boolean, and proximity operators. Previous search expressions may be selected from a drop-down menu in the search window.

5 For easy readability, expected issues automatically appear highlighted. To display more expected issues according to the Pattern record, simply click on the "Predict" button at the top of the screen.

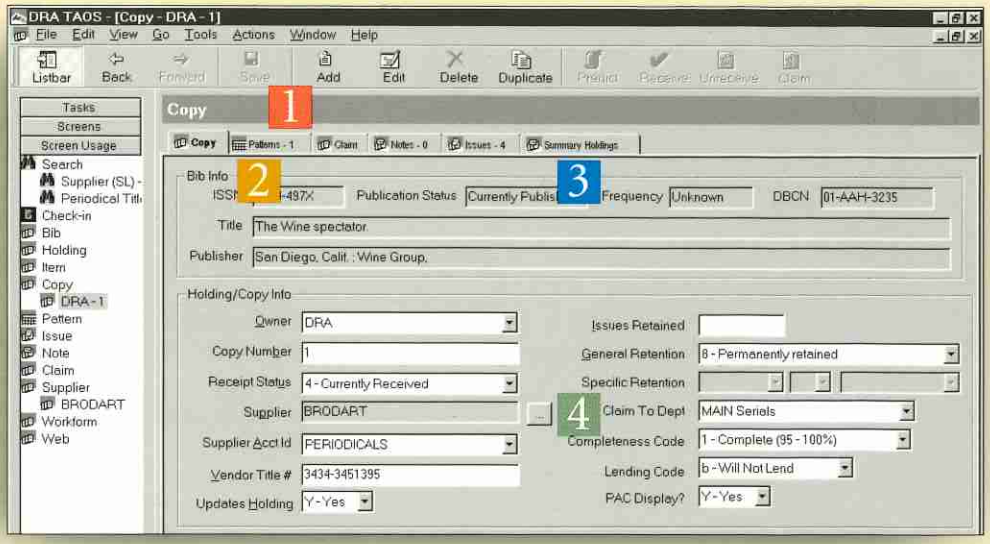
Copy Functions

1 Screen folder tabs and pull down menus put all the information and functionality you need right at your finger tips.

2 Pattern records ensure automatic prediction for titles in your collection. These records contain the publication schedule of each title, the hierarchy of issue enumeration, and how each title should display in DRA Web2, the Taos OPAC.

3 The "Summary Holdings" tab gives a brief synopsis of received issues. Taos Serials automatically updates Summary Holdings upon issue check-in. You may additionally use a free text Summary Holdings statement to accurately address complex holdings.

4 Click here to instantly perform a Supplier search.



Taos Serials keeps manual entry to a minimum. When creating a new Copy record for a serial already held by the library, information from existing Copy records can be copied to the screen and a Holdings record can be automatically created. And because multiple copy records can be attached to one title, Taos Serials also gives you the flexibility to administer multiple copies at multiple locations.

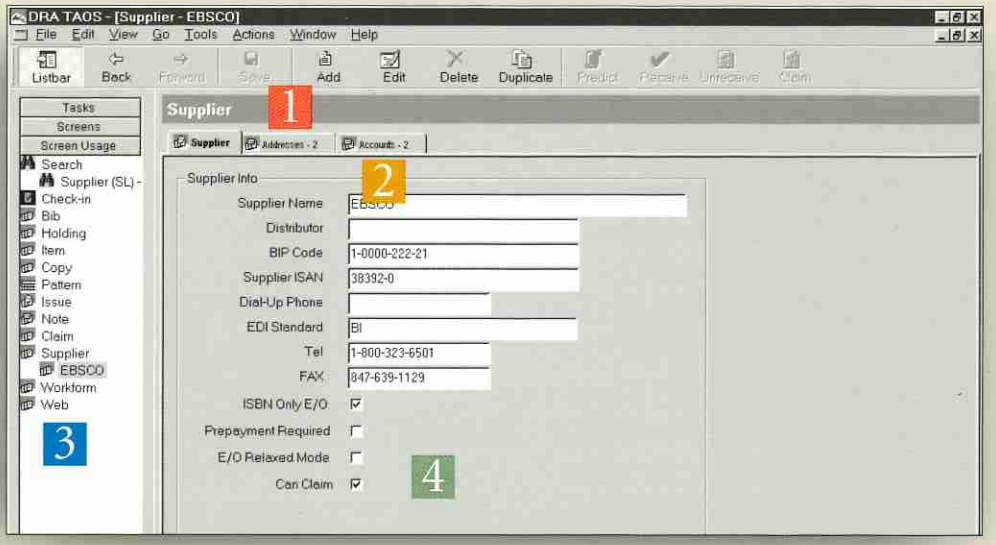
Supplier Functions

1 You may list any number of addresses to accommodate different locations a supplier may have for ordering, payment, returning, and claiming.

2 An unlimited number of accounts may be attached to each supplier for easy allocation and tracking of funds. Accounts may cover the range of purchase categories, including books, periodicals, and multimedia.

3 An Activity Navigator keeps track of all of your activities in progress and allows for easy navigation among various screens. For example, when bringing up an issue check-in screen, you can click the Bibliographic icon on the Activity Navigator to display the full bibliographic record of the periodical. A handy browser function also allows you to move back and forth between any previous records and searches you may have performed.

4 Multiple indexing options are available for the supplier record. You can index and qualify on a variety of terms including supplier name and type, vendor name and type, or contact name.



Each Supplier record establishes default vendor information within Serials for use when running various programs. Future integration with Taos Acquisitions will serve to further enhance the Serials workflow by allowing you to renew subscriptions within one screen and to pay bulk invoices for individual vendors. With easy access to Supplier files, you will also be able to claim from the purchase order screen, reminders screen, or the serials check-in screen.

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THE DRA TAOS MODULES:

cataloging

Taos Cataloging is the industry's premier cataloging tool for the efficient and accurate management of a library's item, authority, holdings, and bibliographic records. Particularly intuitive for those familiar with a Windows environment, Taos Cataloging incorporates such standard functions as the ability to copy and paste, perform unlimited "undo" operations, edit multiple records simultaneously, and move through separate functions quickly and easily. Plus, full Unicode support delivers extensive multilingual capabilities. Taos can display most MARC-supported character sets such as Chinese, Japanese, and Korean.

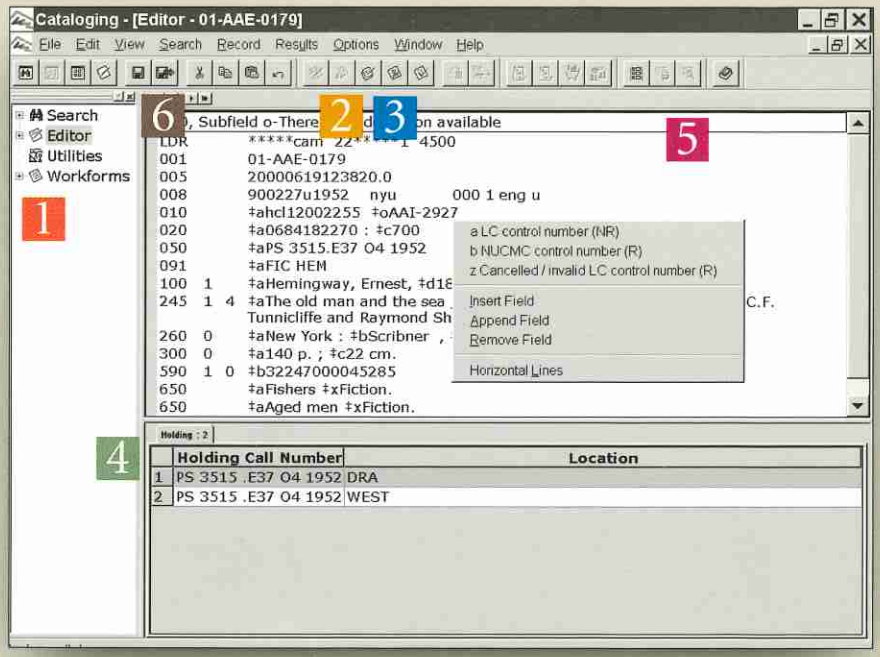
An import/export utility designed to streamline library workflows, Taos Cataloging offers real-time, transparent copy cataloging from DRA databases and other Z39.50 databases into a library's local bibliographic database. Plus, Taos' Z39.50 connection allows staff to search for records on remote databases using the familiar interface of the Taos Cataloging client.

For more information on how Taos Cataloging can bring your library operations to new levels of excellence, please contact the DRA Sales Department at sales@dra.com or call toll free 800 325-0888 US/Canada.

1 The activity navigator keeps track of the operator's varied activities. It allows viewing of previous searches and all open records while providing easy access to workforms.

2 "Sneak preview" records from any hit-list in read-only mode by using the Viewer, without opening the record in edit mode or viewing all data within the record.

3 Compare subject and other headings against your own authority records or check the DRA-maintained LC MARC authority databases. Taos tackles various MARC-supported subject heading systems, from Annotated Card subject headings for children's literature to LCSH, MeSH, local headings, and other authority resources. Instigate direct copy cataloging agreements with other libraries.



Taos Cataloging delivers. *Our Cataloging module enables the editing of MARC records in multiple formats, side-by-side record editing for easy visual comparison, and simultaneous editing of multiple records. Plus, full screen editing of bibliographic, holdings, authority, and patron records allow staff to modify a specific field while viewing the entire record. All editing functions can be performed without a mouse through easy keystroke commands.*

4 Double click on the brief holdings statement to access the full holdings and item information, such as where an item is available and the number of copies.

5 Taos Cataloging offers many help features when editing. Click on the desired field and Taos will prompt you with operations appropriate for your current activity. The Online MARC Help allows you to place your cursor in the MARC record and verify the proper usage of a given field, indicator, or subfield.

6 Validation capabilities catch and correct record errors such as invalid locations and barcodes while supporting library-defined MARC validation routines. Automatic validation and record indexing on saving records.

Transferring Functions

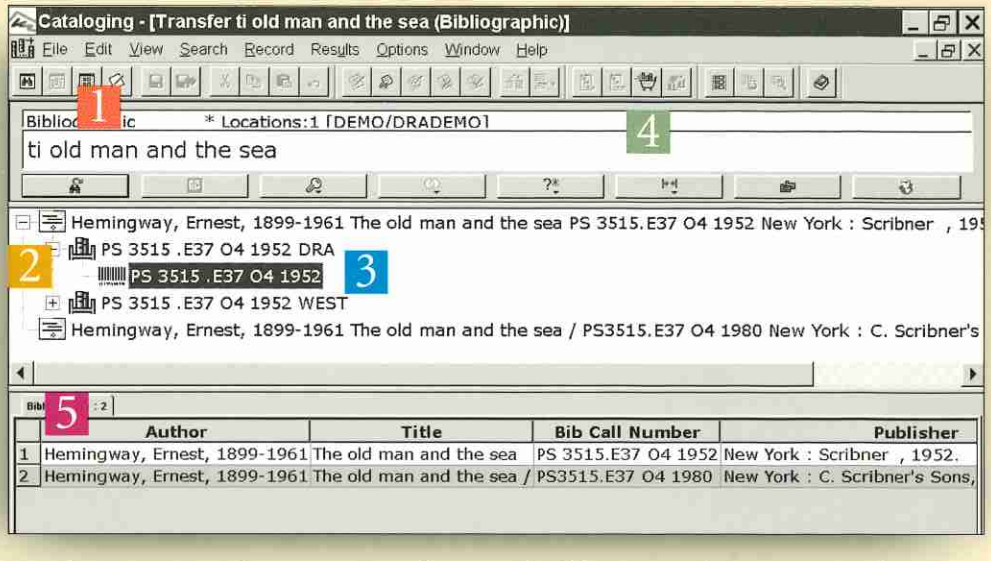
1 The search window displays the record type and database.

2 Easy-to-identify icons further streamline the transfer workflow. A card catalog drawer represents a bibliographic record, a shelf with books represents a holdings record, and a barcode symbol represents an individual item.

3 Transfer multiple items or holdings simultaneously in an easy click-and-transfer process.

4 The shopping cart button holds records for transfer, while the adjacent unload button places the item into the selected destination.

5 Hitlist section displays the results of your search.


Cataloging - [Transfer ti old man and the sea (Bibliographic)]
File Edit View Search Record Results Options Window Help
1
* Locations:1 [DEMO/DRADEMO]
4
ti old man and the sea
Hemingway, Ernest, 1899-1961 The old man and the sea PS 3515.E37 O4 1952 New York : Scribner , 19
2
PS 3515 .E37 O4 1952 DRA
PS 3515 .E37 O4 1952
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PS 3515 .E37 O4 1952 WEST
Hemingway, Ernest, 1899-1961 The old man and the sea / PS3515.E37 O4 1980 New York : C. Scribner's
5
Author
Title
Bib Call Number
Publisher
1 Hemingway, Ernest, 1899-1961 The old man and the sea PS 3515.E37 O4 1952 New York : Scribner , 1952.
2 Hemingway, Ernest, 1899-1961 The old man and the sea / PS3515.E37 O4 1980 New York : C. Scribner's Sons,

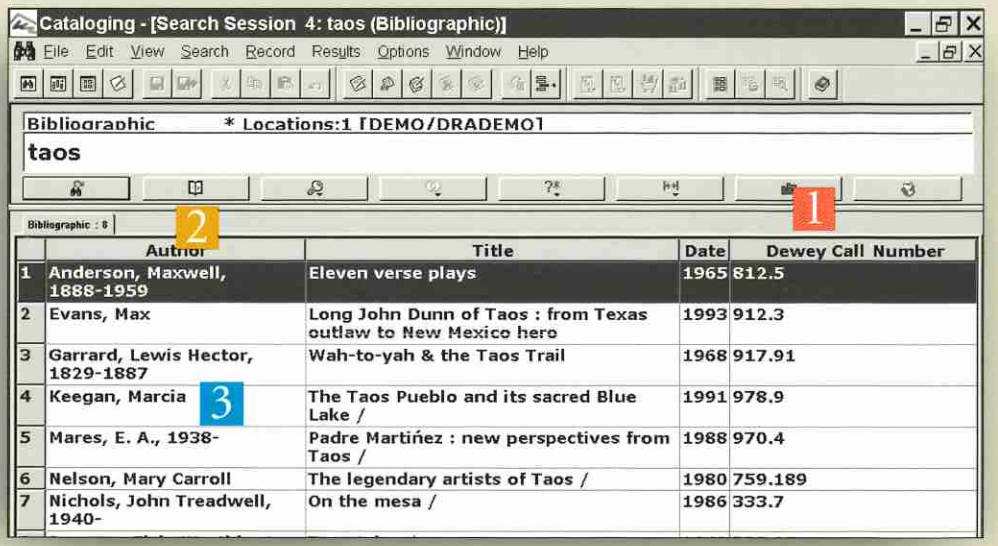
With Taos Cataloging, transferring holdings and item records can be a one-to-one or many-to-one operation. You can elect to transfer multiple holdings attached to one or more bibliographic records, as well as one or more items attached to one or more holdings.

Searching Functions

1 The hitlist can be customized to display a wide range of bibliographic information, including a variety of call number options.

2 Click here to perform one of two available browse searches. A left-justified browse search returns only those records in which the text used for the search appears first in the heading. A keyword on heading browse option delivers records containing the query term(s) anywhere in the heading, resulting in a more varied hitlist.

3 Taos' adherence to Windows conventions allows ordering of individual columns and resizing of windows.


Cataloging - [Search Session 4: taos (Bibliographic)]
File Edit View Search Record Results Options Window Help
Bibliographic * Locations:1 [DEMO/DRADEMO]
taos
1
2
Author
Title
Date
Dewey Call Number
1 Anderson, Maxwell, 1888-1959 Eleven verse plays 1965 812.5
2 Evans, Max Long John Dunn of Taos : from Texas outlaw to New Mexico hero 1993 912.3
3 Garrard, Lewis Hector, 1829-1887 Wah-to-yah & the Taos Trail 1968 917.91
4 Keegan, Marcia 3 The Taos Pueblo and its sacred Blue Lake / 1991 978.9
5 Mares, E. A., 1938- Padre Martińez : new perspectives from Taos / 1988 970.4
6 Nelson, Mary Carroll The legendary artists of Taos / 1980 759.189
7 Nichols, John Treadwell, 1940- On the mesa / 1986 333.7

Taos' graphical search menu streamlines cataloging workflow. Staff can quickly execute searches specifying record types or databases to search while using qualifiers and a variety of operators to ensure precise search results.

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THE DRA TAOS MODULES:

circulation

Taos Circulation handles the high volume and varied workflow of a library's busy circulation desk. Scalable from 100 to 10 million items, Taos Circulation processes multiple requests simultaneously and in real-time. Using either the mouse or the keyboard, circulation staff can efficiently check out or check in items, submit title or item specific requests, view a patron's fine history, add new patrons manually or in batch, and generate an array of notices, receipts, and reports.

Taos Circulation is built to expect the unexpected. Authorized operators can perform on-the-fly Circulation, send items to temporary locations, access Online Help, and even switch into Offline Backup Circulation if needed.

Highly customizable policy files allow a library to set the system parameters and define employee and patron functions across a range of levels including department, library, and systemwide.

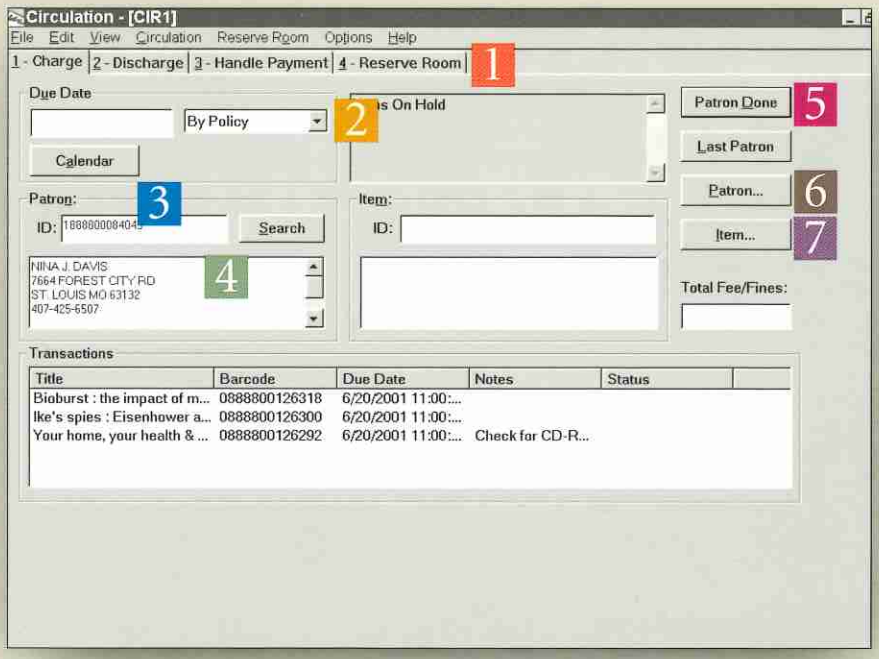
For more information on how Taos Circulation can bring your library operations to new levels of excellence, please contact the DRA Sales Department at sales@dra.com or call toll free 800 325-0888 US/Canada.

1 Each tab represents one of the three main circulation functions: Charge, Discharge and Payment.

2 Clicking on the arrow allows you to set the due date according to a number of criteria including "By Policy," "Fixed for Item," "Fixed for Patron," and "Fixed for Session."

3 Once you scan the Patron ID number the cursor automatically moves to the Item ID box, and you can simply continue scanning without workflow interruption.

4 Patron information pertinent to the charge transaction displays here. Staff can customize this display to suit their workflow needs, determining which pieces of data to present and in what order.



Taos Circulation keeps you moving. *During a charge or discharge transaction, Taos Circulation queries patron and item records for any blocks or holds and alerts staff as necessary. Taos Circulation can accommodate the unique demands of academic, public, consortia, K-12, and special libraries. Highly customizable policy files allow a library to set the system parameters and define employee and patron functions across a range of levels including department, library, and systemwide.*

5 Click on this box to indicate to the system that you are finished with this patron. The system will then clear all fields and ready itself for the next patron. Or depending on your policies, the system may print a receipt of the transactions performed.

6 This button links you to the Patron Record. When adding a new patron, de-duplication measures ensure the accuracy of your patron database.

7 This button brings you to the Item Record.

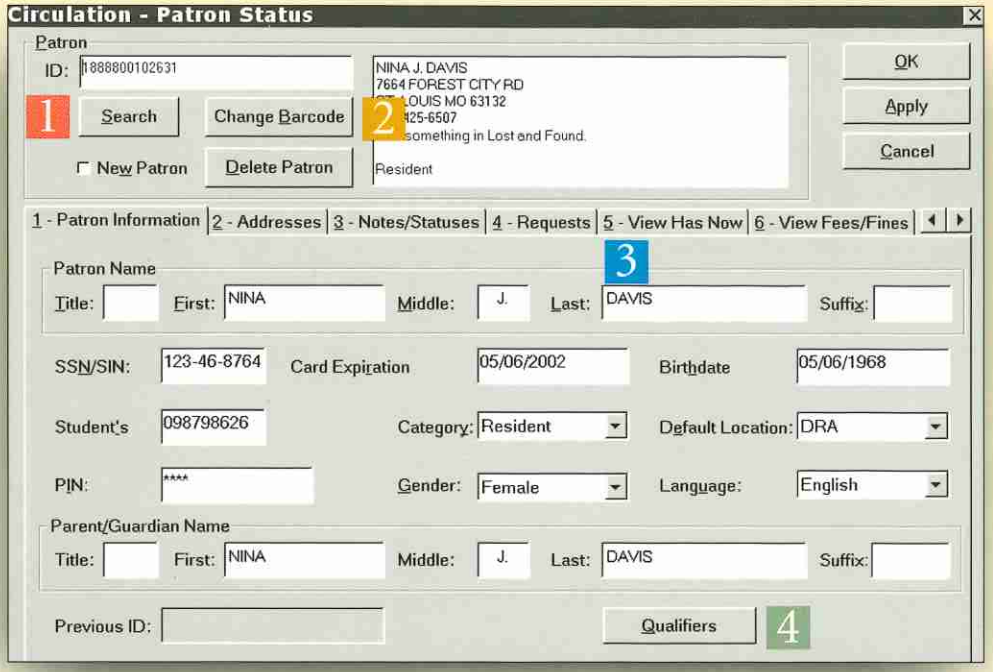
Patron Information

1 If the barcode number isn't available, click on the Search button and search for the patron via indexed fields such as name and address.

2 Replacing a patron's lost library card is easy through this quick Change Barcode button. Plus, Taos allows you to select from any barcode and other ID formats when deciding on the Patron ID format(s) that best accommodates your needs.

3 Each tab represents a folder with specific information about the patron.

4 Click on Qualifiers and a screen pops up that provides additional site-defined statistical categories. This additional patron information allows your staff to generate more detailed circulation reports.



A single Taos Patron Record stores such information as name, address, borrower status, number of items on loan, fees/fines, staff notes, and statistical data. This allows staff to efficiently perform a range of operations pertaining to a patron through one easy portal.

Item Information

1 Each tab represents a folder with specific information about the item.

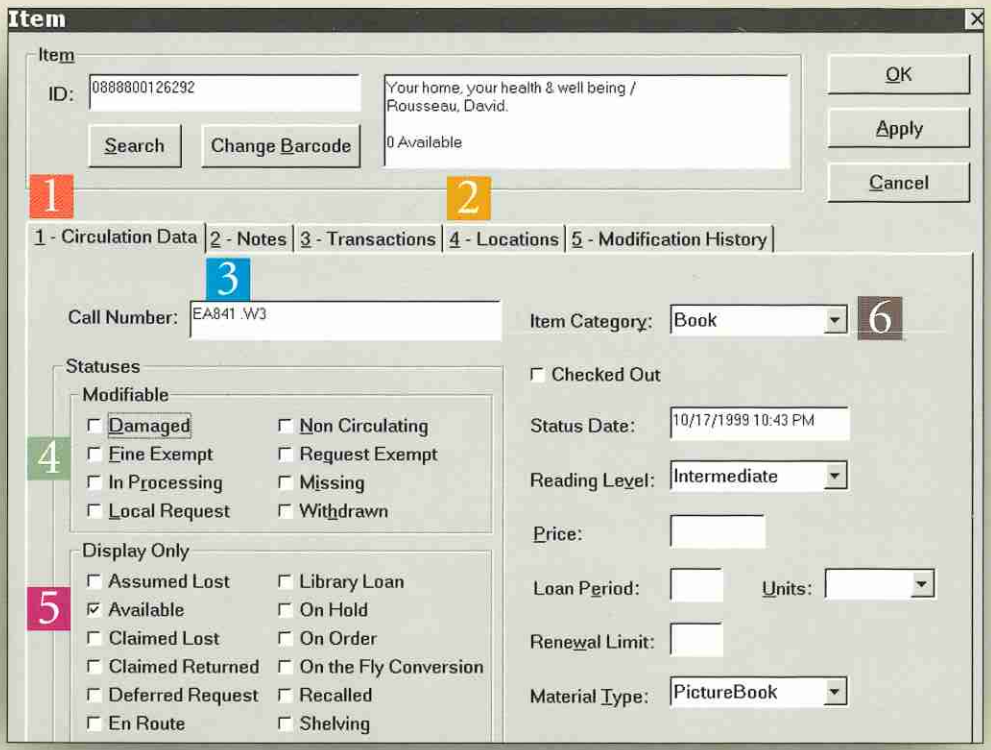
2 The location folder displays comprehensive permanent, temporary, and "previous" and "next" routing locations.

3 Public and private notes can be edited directly on the item screen, automatically updating the field notes in the attached bibliographic record.

4 All updates to item statuses performed by circulation and cataloging staff automatically transfer between the modules.

5 System-generated item statuses keep staff apprised of an item's position in the circulation workflow.

6 Choose the appropriate library-defined item category, and the system automatically enacts the appropriate loan period and corresponding fees as set in the policy files. The operator has the option to override these policy dictates as needed.



Taos Circulation ensures precise collection management. An exhaustive suite of item statuses allow staff to know the location, policy restrictions, and physical condition of a particular item.

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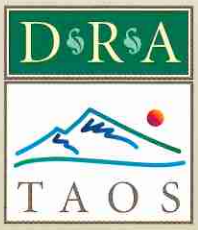
THE DRA TAOS MODULES:

patron authentication seamless and secure



With the advent of Web-based information sharing, libraries are faced with the dilemma of providing patrons easy access to information, while at the same time protecting access to restricted information.

The dramatic increase of Web-based content subscription and ILL services has unquestionably provided a real benefit to libraries. But as more services become available, libraries need a reliable way to identify and authenticate patrons who wish to access resources and services housed outside the library's traditional collection.

Institutions worldwide now store much of their data within the unique, proprietary format of their integrated library systems, creating a real challenge for libraries. It is precisely this lack of a universal language that supports definition and exchange of data between disparate systems that has blocked the development of a modern patron verification facility.

In a revolutionary application of eXtensible Markup Language (XML), DRA has broken through the computer language barrier to provide the definitive patron authentication tool — DRA Patron Authentication. This pioneering tool seamlessly exchanges patron data among disparate applications and operating systems. This allows remote non-DRA systems to query information stored in the patron databases of DRA systems, obtaining details that authenticate a patron as belonging to a DRA system.

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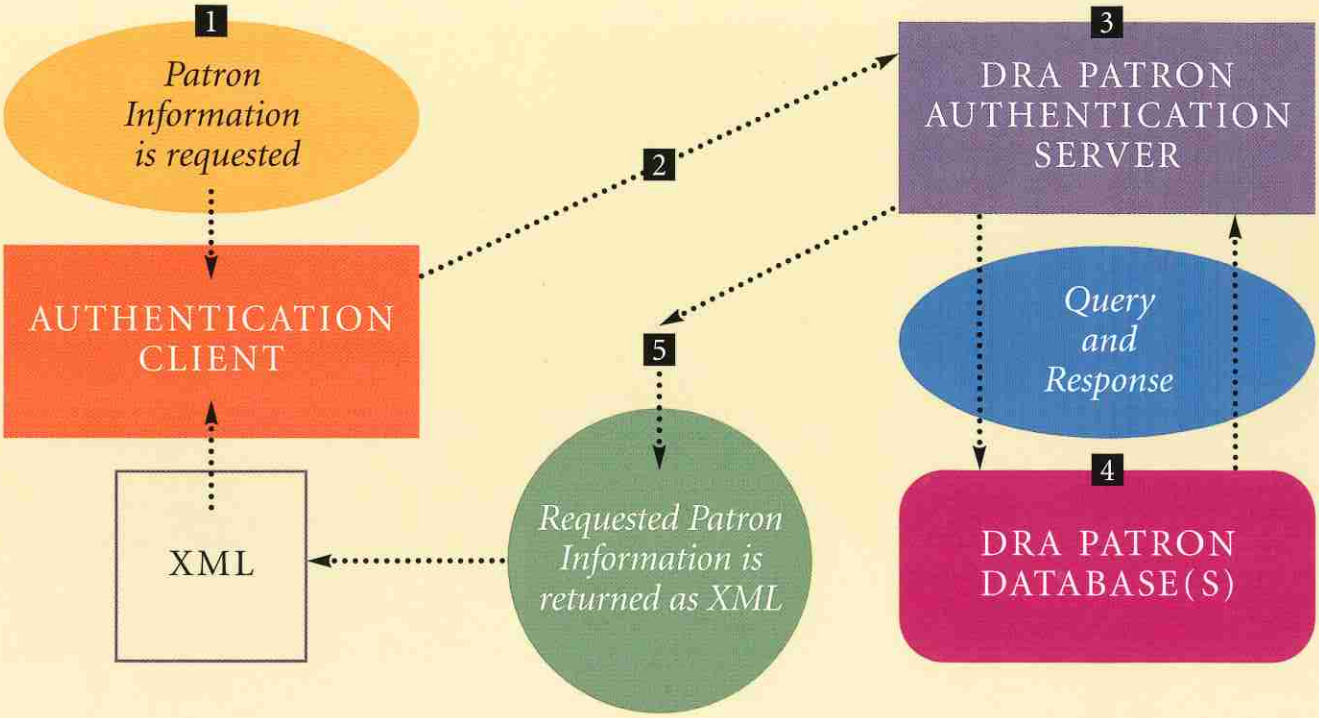
This authentication capability serves numerous applications relevant to a library's workflow. For example, a DRA library can identify a patron wanting to use a given library service, such as a remote database. A third party might also use the patron authentication service to authorize a patron to enter an ILL request or take advantage of another library service. In this manner, libraries can assure the security of their electronic services automatically without expending valuable staff time.



HOW IT WORKS:

security made easy

When a remote database receives a request for access from a DRA patron, it sends the request to the DRA Patron Authentication Server, which in turn queries the DRA patron database. If the patron is found, the DRA server returns an XML file that includes information required by the third party to authenticate the patron. DRA Patron Authentication can also indicate when a patron cannot be located or when the query received is improperly formatted.

A library may configure the data that is returned based on the needs of individual third parties. The XML file may contain minimal information that simply indicated that the patron in question is registered in the library's database, or may contain more detailed patron information as deemed necessary by the third party and the library. This flexibility allows a library to configure the minimum amount of information necessary to authenticate the patron and to protect its patrons' privacy.

Upon receipt of the XML file, requesting applications can easily interpret returned patron category and status data with an XML parser. Because XML is a standardized mechanism, once a remote database understands the XML tags used by DRA Patron Authentication, it can request patron authentication from any library running the DRA Authentication Server.

For more information on how DRA Patron Authentication can bring your library operations to new levels of excellence, please contact the DRA Sales Department at sales@dra.com or call toll free 800 325-0888 US/Canada.

Data Research Associates

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